



Dialog®

Core FT1:

- Business & Industry?, File 9 (1994 - present)
- ABI/INFORM?, File 15 (1971 - present)
- Gale Group PROMT?, File 16 (1990 - present)
- Gale Group Trade & Industry Database?, File 148 (1976 - present)
- Gale Group PROMT?, File 160 (1972-1989)
- Gale Group Computer Database?, File 275 (full-text 1/1988 - present)
- Business Wire, File 610 (Mar 1999 - present)
- Business Wire, File 810 (1986 - February 1999)

Set#	Query
L1	(voice or speech or word or words or keyword or keywords or phrase or phrases or phrasing) WITH (recognition or recognize or recognizes or detect or detects or detecting) SAME (sales) WITH (support or supporting)
L2	(detect or detects or detecting or determine or determines or determining or determination) WITH (customer or agent or representative or customers or agents or representatives) WITH (location)
L3	L1 and L2
L4	(detect or detects or detecting or determine or determines or determining or determination) WITH (customer or agent or representative or customers or agents or representatives) WITH (context or interaction or conversation or exchange or contexts or interactions or conversations or exchanges)
L5	L1 and L4

15/9/1 (Item 1 from file: 15)  
02677629 ? ? ? ? ? 443590481  
TMC labs innovation awards part II

**Keating, Tom**  
**Customer Inter@ction Solutions ? v22n4 ?pp: 60-67**  
**Oct 2003**  
**?Journal Code: TLM**  
**Document Type: Periodical; Feature ?Language: English ?Record Type: Fulltext**  
**Special Feature: Illustration**  
**Word Count: 4607**

## **Abstract:**

Each year, TMC Labs handpicks the leading innovative products and services within the call center industry for its TMC Labs Innovation Awards. Part II of the winners of the TMC Labs Innovation Awards is presented. The winning companies and products discussed are: 1. Spectel, Spectel DataXchange, 2. Stratsoft, StrataDial VC2 - Virtual Contact Center, 3. Symon Communications Inc., Symon Vista, 4. TASKE Technology Inc., TASKE Essential, 5. UpShot Corp., MultiProcess Management, 6. Utopy, SpeechMiner Enterprise, 7. Verint Systems, ULTRA IntelliFind, 8. VoiceGenie Technologies Inc., VoiceGenie VoiceXML Platform, 9. Vision-X Inc., VisionPDS, 10. VXI Corp., VXI TuffSet Everon, 11. WebEx Communications Inc., WebEx Support Center.

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## **Text:**

Each year, TMC Labs handpicks the leading innovative products and services within the call center industry for its TMC Labs Innovation Awards, and each year they have become more popular - this year we received more than 200 applications! This is a good thing, but it is also extraordinarily challenging. While we are honored that more companies than ever have applied for this award, it has made it much more difficult to pick the "distinctive" innovators in our industry, as there were so many innovative products to choose from.

TMC Labs researched each of the applications, checked customer references and eventually arrived at our winners list, the first part of which was presented in our September issue.

So, without further ado, we present Part II of the winners of the TMC Labs Innovation Awards. Congratulations to the winners!

Spectel

Spectel DataXchange

[www.spectel.com](http://www.spectel.com)

Spectel DataXchange is a platform-agnostic data conferencing application that enables service providers and large enterprises to host Web meetings on their networks. The Spectel DataXchange application can scale to thousands of Web meeting participants to collaborate in real-time on documents and presentations simply using a browser. What's very unique about this product is its tight voice/data integration, which enables moderators to view icons depicting who is speaking, then place participants on mute or move them into a sub-conference. It also features chat capabilities as well.

In addition, it also includes post-conference reports for statistics and billing and an open architecture to enable seamless integration of data conferencing capabilities into existing or third-party scheduling and billing applications and databases. Spectel DataXchange claims to be the first to deliver an integrated voice and data conferencing application in this deployment model. This integration enhances productivity by allowing presenters to schedule meetings and notify participants through a variety of end user interfaces: Web, Outlook and Notes, Windows applications, as well as service-specific applications through an open API. Meeting hosts can also manage both voice and data aspects of the meeting to manage participation (enable Q&A and polling, mute lines, lock meetings for security, play roll call, and more). The meeting can be recorded and

archived for later playback, with both voice and data automatically synchronized.

Another unique feature of Spectel DataXchange is that it uses a client-server vs. T.120 (peer-to-peer) architecture, which enables greater scalability and performance optimization regardless of users' connection speed. The server handles meeting load, not meeting host or any single server, enabling Spectel DataXchange to support large events. By auto-detecting connection rates, the Spectel DataXchange server manages data transfer according to connection speed. This enables low bandwidth connections (dial up and GPRS) to effectively participate in meetings. All in all, TMC Labs was quite impressed with Spectel DataXchange's feature-set, especially its voice and data integration and its open API for easy integration.

#### Stratasoft StrataDial VC2 Virtual Contact Center

[www.stratasoft.com](http://www.stratasoft.com)

Any call center worth its salt has invested (or soon will) in a predictive dialer. Newfangled predictive dialers not only perform outbound, but some even have integrated inbound (ACD) routing as well. The even fancier systems can handle not only inbound and outbound calls (blended environment), but they can also route inbound and outbound multimedia interactions, such as Web chat, e-mail, Web callback and more, StrataDial's VC2 - Virtual Contact Center not only has all of the aforementioned features, but it is one of only a select few that runs on the Windows platform using Windows user interface conventions, which makes for a quick learning curve.

In a nutshell, StrataDial VC2 - Virtual Contact Center suite features outbound predictive dialing, inbound automatic call distribution, voice mail and auto-attendant, speech recognition and text-to-speech, Web-based text chatting, e-mail management and routing, fax-on-demand, an interactive voice response (IVR) system and rapid application development (RAD) tools. Speaking of RAD tools, we should mention that StrataDial does not confine you with rigid or static screens. The StrataDial Script and Screen Designer software allows the contact center manager to display any backend data field he or she desires, as well as manipulate, enhance or even completely redesign scripts and screens, all on the fly. The StrataDial Agent software will not only display the screens you designed, but it can also display an embedded browser window at the bottom of your customized screens. Therefore, scripts can be written with any HTML-based software and implemented easily. You can even embed external data into an HTML script and display the information within the browser section of the agent software interface, StrataDial is fully compatible with ODBC data types (i.e., DBF, ACCESS MDB, SQL, etc.). Furthermore, data may be written directly to a client's SQL or Oracle tables from an agent screen.

Besides the plethora of features that StrataDial offers, the company offers a unique and innovative feature called DynaCall. This feature helps cycle through the names in your call lists depending on criteria you select to ensure that your agents are always busy. It provides call center managers with the tools they need to dynamically manage their call lists, as well as increase call list penetration and efficiency. DynaCall features: (1) Intuitive Calling Strategy DynaCall allows the user to outline his or her calling strategy by setting up tasks for each campaign. Tasks are used to set start and stop times, select specific leads and recall leads on a predetermined strategy (i.e., recall answering machines after four hours and busies in five minutes); (2) Automatic Time Zone Management DynaCall can be set to cycle through a variety of time zones automatically, thus eliminating the risk of calling certain states at inappropriate times of

the day. It also allows enhanced list penetration by calling certain time zones at times when prospects are more likely to be there to answer the telephone; (3) Quota-Based Dialing Specific call lists can be assigned with up to two different quotas (each based on a specific term code). When these quotas are met, DynaCall will automatically move on to the next call list. Quotas are easily set and determined on a call list basis; (4) Call List Query Management - With DynaCall, the user is no longer required to create call lists because it does it on its own based on a Task Query Manager. Queries include the term codes to dial as well as any other field parameters set by the user; (5) Real-Time ODBC Connectivity - DynaCall can also import leads dynamically from any ODBC database and include them in the call list query. This is an excellent feature, saving call center managers the trouble of manually importing call lists.

StrataDial has several other tricks up its sleeve, including excellent language support. It supports any language provided by Microsoft Windows, including DBCS (double byte character sets). A translation table is provided for the user to create an agent interface that translates the contents of the agent screen. Once this is set up, agents can view their campaign screens, scripts and call control buttons in their native language. The system can also detect answering machines, thereby allowing a prerecorded message specific for answering machines to be played. Finally, through partnerships, the company integrates with Gryphon Networks, Call Compliance and DNC Solutions to help comply with the FTC's DNC regulations.

Symon Communications, Inc.

Symon Vista [www.symon.com](http://www.symon.com)

In any contact center or even a sales department, having access to performance statistics such as number of outbound calls made by an agent, average on-hold times or average talk time is critical for management to ensure quality of service and provide continual motivation to agents or sales personnel.

Symon Vista is specifically designed for the contact center and enterprise and provides the ability to create and edit applets that display real-time and historical information on Web-enabled pages. Users are enabled to consolidate real-time data metrics into customizable browser, real-time views.

One of the most unique aspects of Symon Vista is its ease of development - anyone, even a non-developer, can build Web pages using their development tool. Even more important, Symon Vista claims that using their product you can quickly deploy business dashboards in a matter of days, versus the few months of some competing solutions, essentially making the product a "shrink-wrapped" solution.

The Vista Applet Wizard will guide you through customizing a Vista Applet, which consists of assigning values and display properties to its applet parameters. Applets can be created for management, supervisor and agent views of pertinent ACD information. Vista also reports on other business system and remote data for consolidated, centralized reporting. One other unique capability of Symon Vista is that unlike generic business intelligence products, Vista can extract data from a wide array of telephony sources, not just databases or enterprise applications, to provide users with a more complete picture. Importantly, it supports incorporating custom data sources using ODBC, XML or ActiveX.

Another innovative feature is that it supports multicast or unicast data distribution. Users can decide on a per-data-display case whether they want to use unicast or multicast technology based on their IT needs. Multicast

saves significant amounts of bandwidth in sending data, especially for real-time data-intensive data sources such as ACDs, which might update some data as often as every few seconds.

We should point out that unlike typical dashboard and scorecard products, Symon Vista can not only display historical data, but real-time data as well. Also, this can be done without relying on the user to have to "refresh" to get the latest data.

TASKE Technology Inc.

TASKE Essential

[www.taske.com](http://www.taske.com)

TASKE Essential makes reporting and monitoring features commonly available in the contact center environment now accessible to any business that requires some level of real-time call monitoring and call reporting. It fills the gap between the traditional call accounting packages and complex, feature-rich call center applications.

TASKE Essential offers a unique combination of real-time monitoring and historical reporting on all trunks and extensions - from a single application. Using the switch platform's CTI link, TASKE Essential monitors all extension activity on the switch. It displays that activity on a manager's desktop in real-time, showing extension details as well as the call state (ringing, on hold, etc.), the called or calling number and the duration of the call. It includes call search capability to isolate individual calls and display call activity in a graphical format, showing call events such as hold times, transfers, conferences, etc. This product also provides extensive extension and trunk reporting capabilities. Also, since TASKE Essential is Web-based and operating-system-independent, users can access the application from any browser.

By using the CTI link for the purpose of monitoring and reporting, we are able to obtain a much more detailed perspective on the call than simply through SMDR records. This enables us to analyze individual calls to assess call flows and call handling issues (frequent holds, transfers, etc.) and do so in real-time.

This product is ideal for any situation in which ensuring good customer service is critical. Since this product allows you to view a call from "cradle to grave," you can ensure that the customer didn't get the "runaround" by being transferred several times or put on hold for too long. Too often, call accounting reports are printed or viewed by a manager, and either the manager gives them only a peripheral look or the reports don't paint a complete picture of what is happening in the call center. In addition, call reports are typically "historical" in nature and not "real-time," therefore you could be viewing a serious problem that occurred in the past. TASKE Essential not only removes some of the complexity of call reports, but also provides real-time analysis to pinpoint problems quickly and paint a much more complete picture to ensure high customer satisfaction.

UpShot Corporation Multiprocess Management [www.upshot.com](http://www.upshot.com)

At the risk of showing our age, we still remember the days when if we wanted remote access to our e-mail, we had to do it by connecting to a bank of modems and use Windows RAS (remote access service) to connect to our network. It was a slow, tedious nightmare. We hoped the Outlook client (then Microsoft Exchange) would add an "offline e-mail access" feature so we could download all our e-mail and then write "offline" replies while on

an airplane, a train, etc., and then send our responses once we got network connectivity. Indeed, this feature was eventually added and it was a godsend for some of us as we traveled to various tradeshows. Unfortunately, this was merely an "offline e-mail application" and not an "offline CRM/contact database" application. Thus, if we needed to look up a contact in our corporate database, we would need to connect to our corporate network and, as we all know, there is no such thing as "100 percent always on, anywhere connectivity."

UpShot Corporation solves this problem with their hosted, Web-based CRM product called Multiprocess Management, which features offline access to your CRM database with full synchronization capabilities. Not only can you view your data offline, but you can also get the same experience as you would if you were online. More important, not only can you view the data, but you can also change the data or add additional data to the database, which is automatically synchronized once network/ Internet connectivity is restored.

This is an extremely rapidly deployable Web-based solution, using XML and .NET technologies, that tightly integrates sales and marketing. It also integrates with back-office systems and popular desktop applications such as Microsoft Outlook e-mail, Word and Excel, Multiprocess Management was specifically designed to meet the complex needs of large organizations and divisions of Fortune 500 companies that require a complete, integrated, online solution that can be deployed quickly across multiple departments or divisions. Too many other CRM solutions take months to roll out, resulting in extra cost. We liked how quickly Multiprocess Management can be deployed.

Multiprocess Management is a fully customizable client-server system. UpShot offers an innovative feature that can display different views and processes to match those used by the various teams, groups or divisions in a large company. Everyone involved in the sales process, from the CEO or VP of sales to an agent, can have a view that matches the processes they use. Each group or division can tailor UpShot to match the processes they use. Multiple views enable different groups to consolidate information into one centralized system without having to sacrifice each group's unique needs. Individual users can use a drag-and-drop interface to design how they want to view, create and update information. For security purposes, companies can designate which users or groups of users have access to a view. In addition, this product also features automated sales process workflow to automate a variety of sales processes. TMC Labs commends UpShot for its offline data access capabilities, usage of open Webbased standards, its extensive customizability (including multiple views) and its ability to be deployed much faster than many competing CRM solutions.

Utopy SpeechMiner Enterprise [www.utopy.com](http://www.utopy.com)

There are many good call recording products that record calls for quality monitoring purposes. The problem is that a call center supervisor can never hope to listen to each and every call. That means there can be some irate or dissatisfied customers who slip through the cracks due to improper agent training or other reason of which the supervisor was never aware. This can result in a lost customer, and as we all know, it's much less expensive to keep an existing customer than it is to attain a new one.

We were very intrigued when Utopy applied for this award with their "word spotting" product called SpeechMiner Enterprise, which is based on Utopy's core development of the SpeechMiner Platform. Just think of SpeechMiner Enterprise as "speech recognition on steroids." Essentially, SpeechMiner Enterprise can analyze recorded calls and "spot" particular words in the conversation which will then trigger

some sort of action. The people behind this technology have been funded by and have done research for the National Security Agency (NSA), Stanford Research Institute (SRI), UC Berkeley and the Israeli Institute of Technology, which is quite an impressive list! If the private sector has this technology, just imagine how advanced the government's "word spotting" algorithms are.

In any event, the SpeechMiner Platform contains all the algorithms and capabilities to understand and analyze a human-to- human telephone conversations. That is, each call that is processed by the SpeechMiner Platform is associated with all the events that occurred in the call. Examples of these events may include when a customer asks for a supervisor, a customer's mention of a competitor's name, an agent who did not provide the right information, a customer expressing dissatisfaction, a customer citing a certain problem with the product, etc. Most of these "events" are more complex than recognizing a word in the conversation. For example, there are many ways that a customer can ask for a supervisor (manager, boss), express their dissatisfaction, or threaten to litigate ("my friend Sue recommended your service" is not about litigation) and SpeechMiner would recognize the difference. In addition, these "events" can be non-linguistic, such as angry pitch, volume, changes in pitch, quiet time, etc. All in all, SpeechMiner has the capability to accurately recognize what is really occurring in the conversation, and understand the words in their context.

The SpeechMiner Enterprise audio player contains important meta-data information. For example, you can see where the events in the call are, and therefore review only the important sections of the call (no need to spend 30 minutes on irrelevant talk time or music). You can begin to playback the call from when, for example, the agent has provided the wrong information or the customer asked for a manager.

By automatically understanding and analyzing the spoken customer -agent interactions, SpeechMiner Enterprise uncovers hidden business intelligence information, whether it's an irate customer or determining frequent problems or questions customers have. SpeechMiner is enabling call centers to reduce costs by automating the measurement of customer satisfaction and improving agent performance, as well as increasing customer loyalty.

Verint Systems ULTRA IntelliFind [www.verint.com](http://www.verint.com)

TMC Labs was so impressed with how innovative and unique "word spotting" technology was, that we were shocked to learn that not one but TWO companies applied with products that have this advanced technology. With technology that borders on the bleeding-edge but with real-world business applications, how could we not grant two awards to both applicants?

Verint System's ULTRA IntelliFind is an advanced analytical solution for generating actionable intelligence from free-form speech. IntelliFind enables decision makers to quickly identify calls relevant to specific business objectives based on user-defined criteria, including key words and phrases. Using IntelliFind, decision makers throughout an enterprise can "subscribe" to and automatically receive calls that include specific customer intelligence to help them meet their business objectives. Individual users can also create customized searches based on their unique requirements and save them for repeated use.

ULTRA IntelliFind listens to every call and converts the call to text, creating a searchable database of audio interactions. Then, ULTRA IntelliFind assigns each call to categories mapped to specific business processes; for example, new accounts, competitive references, account

terminations, first call resolution, etc. Users can search for calls according to categories, keywords or phrases. Then, simply using a browser-based IntelliFind screen, users can see all calls that meet the search criteria, along with relevance, category, keyword and call-related information, and then playback the calls. You can also view a graphical display charting contacts by date and category. TMC Labs was very impressed with this "word spotting" speech-recognition technology. Though it may be new, we predict this technology will become a mainstay within customer-centric organizations in the foreseeable future.

VoiceGenie Technologies Inc. VoiceGenie VoiceXML Platform  
[www.voicegenie.com](http://www.voicegenie.com)

We won't go into the benefits of VoiceXML since its advantages have been extolled many times. We will, however, discuss a company that is leading the way in VoiceXML technologies: VoiceGenie. VoiceGenie's VoiceXML platform allows enterprises and telecom carriers to develop and deploy sophisticated IVR (interactive voice response) applications, speech-enabled services and voice portals. VoiceGenie supports both hosted or a premise-based solution. Engineered using an open standards-based architecture, it provides for excellent scalability, flexibility and performance with simultaneous support for an impressive number of speech recognition and text-to-speech engines. Due to its support for third-party engines, this allows applications to be deployed seamlessly into almost any environment, leveraging investments in existing applications. VoiceGenie claims its platform currently answers millions of calls for customers each day. They also claim to be the first to market, with a 100 percent compliant VoiceXML platform.

VoiceGenie can perform several useful speech applications, such as VAD (voice activated dialing), retrieve Web information, make online transactions and manage e-mail and voice mail quickly and easily, simply by enabling the user to speak into any phone. Using VoiceGenie, users can gain access to Web-based information and services anywhere, any time, from any phone. Using this technology results in increased automation of many transactions which previously required live agents. Not only does this result in increased efficiency and a reduction in costs, but it also frees agents to handle more complex queries rather than dealing with simple inquiries that can demoralize your agents and waste their time.

VoiceGenie's VoiceXML platform provides full VoiceXML 2.0 compliance, 225+ advanced extensions and call control capabilities, simultaneous support for VoIP (SIP and H.323) and PSTN, as well as comprehensive real-time operations, administration and management capabilities. Finally, VoiceGenie has excellent application tools to aid in the development of VoiceXML applications.

Vision-X, Inc. VisionPDS [www.vxiusa.com](http://www.vxiusa.com)

One thing is for certain, with the recent Federal Trade Commission do-not-call legislation, many companies are scrambling to ensure their predictive dialer equipment is in compliance. What this also means is that many companies are upgrading their existing predictive dialer to the latest software revision or even buying and deploying new equipment to ensure compliance,

Vision-X claims their VisionPDS will alleviate their customers' concerns with their ability to ensure compliance, PDS talks to the telephone network directly to get a quick and precise analysis of each call, which allows you to detect and exclude the transfer of certain calls to agents, such as an answering machine, line busy, no answer, SIT tones, etc. It is also very

unique in its ability to support multiple digital signals such as SS7, ISDN and R2 to get a precise analysis of each call.

The company claims to provide an average customer waiting time of six-tenths of a second, but in the few instances where there is a delay due to an agent not being available, their system can play a voice message based on a set time limitation (which depends on legal requirements) and connect to an agent as soon as one becomes available.

It fully supports distributed call center environments, including access to SOHO and telecommuting agents. It also supports blended dialing mode: preview, predictive and progressive. Finally, we like that it even supports a VoIP soft phone on a Web page.

VXI Corporation VXI TuffSet Everon [www.vxicorp.com](http://www.vxicorp.com)

We just hate dealing with headset amplifiers. Why, do you ask? Because they are so proprietary! Since some of our TMC Labs engineers have done IT support in the past, they've had to deal with installing headsets for sales personnel and call center agents. The problem is, our company has a motley collection of various headsets from a plethora of headset manufacturers. We have a mix of headset pieces (over-the-ear and over-the-head) that work only with a specific manufacturer's amplifier. Even worse, sometimes the manufacturer changes the interface on the amplifier so you can't even connect a headset piece labeled "Company XYZ" to an amplifier with the same name. We have a pile of unmatched headset pieces and amplifiers like so many unmatched socks in a box, and we have to guess and try to match them up when installing a new headset. It's enough to give anyone a headache. In fact, considering we have to deal with only 20 or so headsets, we can only imagine the nightmare of managing headset equipment in a large call center. Luckily, our pain (and that of other companies, as well) has not gone unnoticed.

VXI Corporation has designed a universal telephone amplifier called the Tuffset Everon that accepts headsets from all major headset manufacturers including VXI, GN Netcom and Plantronics. The Everon amplifier has great compatibility with basically any telephone system and has superb battery life, VXI Corporation states they are the true "innovator" and the only company to accept multiple manufacturers' headsets. No more digging in our pile of amplifiers, no more guesswork matching components, and no more being stuck using the manufacturer's often overpriced amplifier. What more could we ask? We tip our caps to VXI Corporation.

WebEx Communications, Inc. WebEx Support Center [www.webex.com](http://www.webex.com)

There are several hosted solutions that offer remote desktop control/collaboration/Web meeting. What distinguishes WebEx from many of its competitors is that in addition to being able to share data (via PowerPoint slides, screen sharing or co-browsing), WebEx offers the unique capability of using VoIP to transmit voice. It fully supports both H.323 and SIP gateways in its architecture. Not only can you use VoIP technology, but you can also display real-time video for videoconferencing capabilities.

Essentially, WebEx Support Center is a carrier-class solution that offers an all-in-one, Web-based, firewall-friendly solution with integrated data, voice and video, providing users with the ability to share presentations, share documents, co-browse the Web, share applications and remotely control applications and desktops. Since it is a hosted model, Support Center service does not require hardware or software investments, IT resources or firewall reconfiguration. The solution is 100 percent Web-based and is cross-platform compatible, allowing Windows, Mac and Unix users to collaborate on applications running on different platforms. You can also do

on-the-fly file transfers, enabling presenters to distribute an edited file to all participants at the end of a collaborative meeting.

Another important feature is permission-based desktop remote control, allowing technical support personnel to immediately diagnose and fix customer problems. Additionally, WebEx allows "spontaneous presenter delegation," which enables any attendee in a meeting to instantly become the presenter and share presentations, documents or applications resident only on his/her system. It also features centralized policy administration controls and detailed reporting tools. In addition, users can actually record and edit sessions, which can be a valuable resource for companies that wish to use recorded sessions as training tools.

The most important feature, in our opinion, is actually a new feature. WebEx Support Center now uses the new MediaTone network. Created with a carrier-class information-switching architecture, the MediaTone Network delivers optimal performance by routing communications across several WebEx switching centers. The result is a high-performance network that provides superb levels of service integration, security, personalization and performance.

For security, it offers secure, real-time, transient data exchange, so that presentations and documents need never be uploaded to an external server. In fact, the WebEx MediaTone Network integrates a scalable software and API architecture specifically designed for efficient delivery over their distributed network. The network features globally distributed hubs, 24x7 network load-balancing and 128-bit SSL encryption to ensure confidential online meetings. WebEx claims that all session contents are switched through the MediaTone Network, and are never persistently stored in the WebEx infrastructure, which obviously reduces the chances for theft of any private data. TMC Labs has used WebEx's products and services in the past for press meetings; and we have always been impressed with its feature set. Now, with the addition of integrated VoIP and videoconferencing over a load-balanced global network, TMC Labs has nothing but the highest regard for WebEx for their continual improvement of the breadth of features offered in their solution.

Tom Keating, Chief Technology Officer & Executive Technology Editor,  
TMC

## **THIS IS THE FULL-TEXT.**

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### **Company Names:**

**Spectel ( NAICS:334210; 511210 )**

**Upshot Corp ( NAICS:511210; 541613 )**

**SYMON Communications Inc ( NAICS:511210; 334210 )**

**Utopy Inc ( NAICS:511210 )**

**Verint Systems Inc ( NAICS:511210 )**

**Geographic Names: United States; US**

**Descriptors: Awards & honors; Manycompanies; Software packages; Software industry;  
Telecommunications**

**Classification Codes: 8302 (CN=Software and computer services); 5240 (CN=Software & systems);  
5150 (CN=Energy management); 9190 (CN=United States)**

**Print Media ID: 12435**

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**15/9/2 (Item 2 from file: 148)**

**16671258 ?? Supplier Number: 110813662 (THIS IS THE FULL TEXT )**  
**TMC Labs Innovation Awards: Part II.(Call Center/CRM Management Scope)**

**Keating, Tom**

**Customer Interaction Solutions , 22 , 4 , 60(6)**

**Oct , 2003**

**ISSN: 1533-3078**

**Language: English**

**Record Type: Fulltext**

**Word Count: 4979 ? ?Line Count: 00410**

**Text:**

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StrataDial VC2 - Virtual Contact Center  
[www.stratasoft.com](http://www.stratasoft.com)

Any call center worth its salt has invested (or soon will) in a predictive dialer. Newfangled predictive dialers not only perform outbound, but some even have integrated inbound (ACD) routing as well. The even fancier systems can handle not only inbound and outbound calls (blended environment), but they can also route inbound and outbound multimedia interactions, such as Web chat, e-mail, Web callback and more. StrataDial's VC2--Virtual Contact Center not only has all of the aforementioned features, but it is one of only a select few that runs on the Windows platform using Windows user interface conventions, which makes for a quick learning curve.

In a nutshell, StrataDial VC2--Virtual Contact Center suite features outbound predictive dialing, inbound automatic call distribution, voice mail and auto-attendant, speech recognition and text-to-speech, Web-based text chatting, e-mail management and routing, fax-on-demand, an interactive voice response (IVR) system and rapid application development (RAD) tools. Speaking of RAD tools, we should mention that StrataDial does not confine you with rigid or static screens. The StrataDial Script and Screen Designer software allows the contact center manager to display any backend data field he or she desires, as well as manipulate, enhance or even completely redesign scripts and screens, all on the fly. The StrataDial Agent software will not only display the screens you designed, but it can also display an embedded browser window at the bottom of your customized screens. Therefore, scripts can be written with any HTML-based software and implemented easily. You can even embed external data into an HTML script and display the information within the browser section of the agent software interface. StrataDial is fully compatible with ODBC data types (i.e., DBF, ACCESS MDB, SQL, etc.). Furthermore, data may be written directly to a client's SQL or Oracle tables from an agent screen.

Besides the plethora of features that StrataDial offers, the company offers a unique and innovative feature called DynaCall. This feature helps cycle through the names in your call lists depending on criteria you select to ensure that your agents are always busy. It provides call center managers with the tools they need to dynamically manage their call lists, as well as increase call list penetration and efficiency. DynaCall features: (1) Intuitive Calling Strategy -- DynaCall allows the user to outline his or her calling strategy by setting up tasks for each campaign. Tasks are used to set start and stop times, select specific leads and recall leads on a predetermined strategy (i.e., recall answering machines after four hours and busies in five minutes); (2) Automatic Time Zone Management -- DynaCall can be set to cycle through a variety of time zones automatically, thus eliminating the risk of calling certain states at inappropriate times of the day. It also allows enhanced list penetration by calling certain time zones at times when prospects are more likely to be there to answer the telephone; (3) Quota-Based Dialing -- Specific call lists can be assigned with up to two different quotas (each based on a specific term code). When these quotas are met, DynaCall will automatically

move on to the next call list. Quotas are easily set and determined on a call list basis; (4) Call List Query Management -- With DynaCall, the user is no longer required to create call lists because it does it on its own based on a Task Query Manager. Queries include the term codes to dial as well as any other field parameters set by the user; (5) Real-Time ODBC Connectivity -- DynaCall can also import leads dynamically from any ODBC database and include them in the call list query. This is an excellent feature, saving call center managers the trouble of manually importing call lists.

StrataDial has several other tricks up its sleeve, including excellent language support. It supports any language provided by Microsoft Windows, including DBCS (double byte character sets). A translation table is provided for the user to create an agent interface that translates the contents of the agent screen. Once this is set up, agents can view their campaign screens, scripts and call control buttons in their native language. The system can also detect answering machines, thereby allowing a prerecorded message specific for answering machines to be played. Finally, through partnerships, the company integrates with Gryphon Networks, Call Compliance and DNC Solutions to help comply with the FTC's DNC regulations.

Symon Communications, Inc.

Symon Vista

[www.symon.com](http://www.symon.com)

In any contact center or even a sales department, having access to performance statistics such as number of outbound calls made by an agent, average on-hold times or average talk time is critical for management to ensure quality of service and provide continual motivation to agents or sales personnel.

Symon Vista is specifically designed for the contact center and enterprise and provides the ability to create and edit applets that display real-time and historical information on Web-enabled pages. Users are enabled to consolidate real-time data metrics into customizable browser, real-time views.

One of the most unique aspects of Symon Vista is its ease of development--anyone, even a non-developer, can build Web pages using their development tool. Even more important, Symon Vista claims that using their product you can quickly deploy business dashboards in a matter of days, versus the few months of some competing solutions, essentially making the product a "shrink-wrapped" solution.

The Vista Applet Wizard will guide you through customizing a Vista Applet, which consists of assigning values and display properties to its applet parameters. Applets can be created for management, supervisor and agent views of pertinent ACD information. Vista also reports on other business system and remote data for consolidated, centralized reporting. One other unique capability of Symon Vista is that unlike generic business intelligence products, Vista can extract data from a wide array of telephony sources, not just data-bases or enterprise applications, to provide users with a more complete picture. Importantly, it supports incorporating custom data sources using ODBC, XML or ActiveX.

Another innovative feature is that it supports multicast or unicast data distribution. Users can decide on a per-data-display case whether they want to use unicast or multicast technology based on their IT needs. Multicast saves significant amounts of bandwidth in sending data, especially for real-time data-intensive data sources such as ACDs, which might update some data as often as every few seconds.

We should point out that unlike typical dashboard and scorecard products, Symon Vista can not only display historical data, but real-time data as well. Also, this can be done without relying on the user to have to "refresh" to get the latest data.

TASKE Technology Inc.

TASKE Essential

[www.taske.com](http://www.taske.com)

TASKE Essential makes reporting and monitoring features commonly

available in the contact center environment now accessible to any business that requires some level of real-time call monitoring and call reporting. It fills the gap between the traditional call accounting packages and complex, feature-rich call center applications.

TASKE Essential offers a unique combination of real-time monitoring and historical reporting on all trunks and extensions--from a single application. Using the switch platform's CTI link, TASKE Essential monitors all extension activity on the switch. It displays that activity on a manager's desktop in real-time, showing extension details as well as the call state (ringing, on hold, etc.), the called or calling number and the duration of the call. It includes call search capability to isolate individual calls and display call activity in a graphical format, showing call events such as hold times, transfers, conferences, etc. This product also provides extensive extension and trunk reporting capabilities. Also, since TASKE Essential is Web-based and operating-system-independent, users can access the application from any browser.

By using the CTI link for the purpose of monitoring and reporting, we are able to obtain a much more detailed perspective on the call than simply through SMDR records. This enables us to analyze individual calls to assess call flows and call handling issues (frequent holds, transfers, etc.) and do so in real-time.

This product is ideal for any situation in which ensuring good customer service is critical. Since this product allows you to view a call from "cradle to grave," you can ensure that the customer didn't get the "runaround" by being transferred several times or put on hold for too long. Too often, call accounting reports are printed or viewed by a manager, and either the manager gives them only a peripheral look or the reports don't paint a complete picture of what is happening in the call center. In addition, call reports are typically "historical" in nature and not "real-time," therefore you could be viewing a serious problem that occurred in the past. TASKE Essential not only removes some of the complexity of call reports, but also provides real-time analysis to pinpoint problems quickly and paint a much more complete picture to ensure high customer satisfaction.

UpShot Corporation MultiProcess Management  
[www.upshot.com](http://www.upshot.com)

At the risk of showing our age, we still remember the days when if we wanted remote access to our e-mail, we had to do it by connecting to a bank of modems and use Windows RAS (remote access service) to connect to our network. It was a slow, tedious nightmare. We hoped the Outlook client (then Microsoft Exchange) would add an "offline e-mail access" feature so we could download all our e-mail and then write "offline" replies while on an airplane, a train, etc., and then send our responses once we got network connectivity. Indeed, this feature was eventually added and it was a godsend for some of us as we traveled to various tradeshows. Unfortunately, this was merely an "offline e-mail application" and not an "offline CRM/contact database" application. Thus, if we needed to look up a contact in our corporate database, we would need to connect to our corporate network and, as we all know, there is no such thing as "100 percent always on, anywhere connectivity."

UpShot Corporation solves this problem with their hosted, Web-based CRM product called MultiProcess Management, which features offline access to your CRM database with full synchronization capabilities. Not only can you view your data offline, but you can also get the same experience as you would if you were online. More important, not only can you view the data, but you can also change the data or add additional data to the database, which is automatically synchronized once network/Internet connectivity is restored.

This is an extremely rapidly deployable Web-based solution, using XML and .NET technologies, that tightly integrates sales and marketing. It also integrates with back-office systems and popular desktop applications such as Microsoft Outlook e-mail, Word and Excel, MultiProcess Management

was specifically designed to meet the complex needs of large organizations and divisions of Fortune 500 companies that require a complete, integrated, online solution that can be deployed quickly across multiple departments or divisions. Too many other CRM solutions take months to roll out, resulting in extra cost. We liked how quickly MultiProcess Management can be deployed.

MultiProcess Management is a fully customizable client-server system. UpShot offers an innovative feature that can display different views and processes to match those used by the various teams, groups or divisions in a large company. Everyone involved in the sales process, from the CEO or VP of sales to an agent, can have a view that matches the processes they use. Each group or division can tailor UpShot to match the processes they use. Multiple views enable different groups to consolidate information into one centralized system without having to sacrifice each group's unique needs. Individual users can use a drag-and-drop interface to design how they want to view, create and update information. For security purposes, companies can designate which users or groups of users have access to a view. In addition, this product also features automated sales process workflow to automate a variety of sales processes. TMC Labs commends UpShot for its offline data access capabilities, usage of open Web-based standards, its extensive customizability (including multiple views) and its ability to be deployed much faster than many competing CRM solutions.

Utopy SpeechMiner Enterprise  
[www.utopy.com](http://www.utopy.com)

There are many good call recording products that record calls for quality monitoring purposes. The problem is that a call center supervisor can never hope to listen to each and every call. That means there can be some irate or dissatisfied customers who slip through the cracks due to improper agent training or other reason of which the supervisor was never aware. This can result in a lost customer, and as we all know, it's much less expensive to keep an existing customer than it is to attain a new one.

We were very intrigued when Utopy applied for this award with their "word spotting" product called SpeechMiner Enterprise, which is based on Utopy's core development of the SpeechMiner Platform. Just think of SpeechMiner Enterprise as "speech recognition on steroids." Essentially, SpeechMiner Enterprise can analyze recorded calls and "spot" particular words in the conversation which will then trigger some sort of action. The people behind this technology have been funded by and have done research for the National Security Agency (NSA), Stanford Research Institute (SRI), UC Berkeley and the Israeli Institute of Technology, which is quite an impressive list! If the private sector has this technology, just imagine how advanced the government's "word spotting" algorithms are.

In any event, the SpeechMiner Platform contains all the algorithms and capabilities to understand and analyze a human-to-human telephone conversations. That is, each call that is processed by the SpeechMiner Platform is associated with all the events that occurred in the call. Examples of these events may include when a customer asks for a supervisor, a customer's mention of a competitor's name, an agent who did not provide the right information, a customer expressing dissatisfaction, a customer citing a certain problem with the product, etc. Most of these "events" are more complex than recognizing a word in the conversation. For example, there are many ways that a customer can ask for a supervisor (manager, boss), express their dissatisfaction, or threaten to litigate ("my friend Sue recommended your service" is not about litigation) and SpeechMiner would recognize the difference. In addition, these "events" can be non-linguistic, such as angry pitch, volume, changes in pitch, quiet time, etc. All in all, SpeechMiner has the capability to accurately recognize what is really occurring in the conversation, and understand the words in their context.

The SpeechMiner Enterprise audio player contains important meta-data

information. For example, you can see where the events in the call are, and therefore review only the important sections of the call (no need to spend 30 minutes on irrelevant talk time or music). You can begin to playback the call from when, for example, the agent has provided the wrong information or the customer asked for a manager.

By automatically understanding and analyzing the spoken customer-agent interactions, SpeechMiner Enterprise uncovers hidden business intelligence information, whether it's an irate customer or determining frequent problems or questions customers have. SpeechMiner is enabling call centers to reduce costs by automating the measurement of customer satisfaction and improving agent performance, as well as increasing customer loyalty.

Verint Systems ULTRA IntelliFind

[www.verint.com](http://www.verint.com)

TMC Labs was so impressed with how innovative and unique "word spotting" technology was, that we were shocked to learn that not one but TWO companies applied with products that have this advanced technology. With technology that borders on the bleeding-edge but with real-world business applications, how could we not grant two awards to both applicants?

Verint System's ULTRA IntelliFind is an advanced analytical solution for generating actionable intelligence from free-form speech. IntelliFind enables decision makers to quickly identify calls relevant to specific business objectives based on user-defined criteria, including key words and phrases. Using IntelliFind, decision makers throughout an enterprise can "subscribe" to and automatically receive calls that include specific customer intelligence to help them meet their business objectives. Individual users can also create customized searches based on their unique requirements and save them for repeated use.

ULTRA IntelliFind listens to every call and converts the call to text, creating a searchable database of audio interactions. Then, ULTRA IntelliFind assigns each call to categories mapped to specific business processes; for example, new accounts, competitive references, account terminations, first call resolution, etc. Users can search for calls according to categories, keywords or phrases. Then, simply using a browser-based IntelliFind screen, users can see all calls that meet the search criteria, along with relevance, category, keyword and call-related information, and then playback the calls. You can also view a graphical display charting contacts by date and category. TMC Labs was very impressed with this "word spotting" speech-recognition technology. Though it may be new, we predict this technology will become a mainstay within customer-centric organizations in the foreseeable future.

VoiceGenie Technologies Inc. VoiceGenie VoiceXML Platform

[www.voicegenie.com](http://www.voicegenie.com)

We won't go into the benefits of VoiceXML since its advantages have been extolled many times. We will, however, discuss a company that is leading the way in VoiceXML technologies: VoiceGenie. VoiceGenie's VoiceXML platform allows enterprises and telecom carriers to develop and deploy sophisticated IVR (interactive voice response) applications, speech-enabled services and voice portals. VoiceGenie supports both hosted or a premise-based solution. Engineered using an open standards-based architecture, it provides for excellent scalability, flexibility and performance with simultaneous support for an impressive number of speech recognition and text-to-speech engines. Due to its support for third-party engines, this allows applications to be deployed seamlessly into almost any environment, leveraging investments in existing applications. VoiceGenie claims its platform currently answers millions of calls for customers each day. They also claim to be the first to market, with a 100 percent compliant VoiceXML platform.

VoiceGenie can perform several useful speech applications, such as

VAD (voice activated dialing), retrieve Web information, make online transactions and manage e-mail and voice mail quickly and easily, simply by enabling the user to speak into any phone. Using VoiceGenie, users can gain access to Web-based information and services anywhere, any time, from any phone. Using this technology results in increased automation of many transactions which previously required live agents. Not only does this result in increased efficiency and a reduction in costs, but it also frees agents to handle more complex queries rather than dealing with simple inquiries that can demoralize your agents and waste their time.

VoiceGenie's VoiceXML platform provides full VoiceXML 2.0 compliance, 225+ advanced extensions and call control capabilities, simultaneous support for VoIP (SIP and H.323) and PSTN, as well as comprehensive real-time operations, administration and management capabilities. Finally, VoiceGenie has excellent application tools to aid in the development of VoiceXML applications.

Vision-X, Inc. VisionPDS

[www.vxiusa.com](http://www.vxiusa.com)

One thing is for certain, with the recent Federal Trade Commission do-not-call legislation, many companies are scrambling to ensure their predictive dialer equipment is in compliance. What this also means is that many companies are upgrading their existing predictive dialer to the latest software revision or even buying and deploying new equipment to ensure compliance.

Vision-X claims their VisionPDS will alleviate their customers' concerns with their ability to ensure compliance. PDS talks to the telephone network directly to get a quick and precise analysis of each call, which allows you to detect and exclude the transfer of certain calls to agents, such as an answering machine, line busy, no answer, SIT tones, etc. It is also very unique in its ability to support multiple digital signals such as SS7, ISDN and R2 to get a precise analysis of each call.

The company claims to provide an average customer waiting time of six-tenths of a second, but in the few instances where there is a delay due to an agent not being available, their system can play a voice message based on a set time limitation (which depends on legal requirements) and connect to an agent as soon as one becomes available.

It fully supports distributed call center environments, including access to SOHO and telecommuting agents. It also supports blended dialing mode: preview, predictive and progressive. Finally, we like that it even supports a VoIP soft phone on a Web page.

VXI Corporation VXI TuffSet Everon

[www.vxicorp.com](http://www.vxicorp.com)

We just hate dealing with headset amplifiers. Why, do you ask? Because they are so proprietary! Since some of our TMC Labs engineers have done IT support in the past, they've had to deal with installing headsets for sales personnel and call center agents. The problem is, our company has a motley collection of various headsets from a plethora of headset manufacturers. We have a mix of headset pieces (over-the-ear and over-the-head) that work only with a specific manufacturer's amplifier. Even worse, sometimes the manufacturer changes the interface on the amplifier so you can't even connect a headset piece labeled "Company XYZ" to an amplifier with the same name. We have a pile of unmatched headset pieces and amplifiers like so many unmatched socks in a box, and we have to guess and try to match them up when installing a new headset. It's enough to give anyone a headache. In fact, considering we have to deal with only 20 or so headsets, we can only imagine the nightmare of managing headset equipment in a large call center. Luckily, our pain (and that of other companies, as well) has not gone unnoticed.

VXI Corporation has designed a universal telephone amplifier called the Tuffset Everon that accepts headsets from all major headset manufacturers including VXI, GN Netcom and Plantronics. The Everon amplifier has great compatibility with basically any telephone system and has superb battery life. VXI Corporation states they are the true

"innovator" and the only company to accept multiple manufacturers' headsets. No more digging in our pile of amplifiers, no more guesswork matching components, and no more being stuck using the manufacturers' often overpriced amplifier. What more could we ask? We tip our caps to VXI Corporation.

WebEx Communications, Inc. WebEx Support Center [www.webex.com](http://www.webex.com)

There are several hosted solutions that offer remote desktop control/collaboration/Web meeting. What distinguishes WebEx from many of its competitors is that in addition to being able to share data (via PowerPoint slides, screen sharing or co-browsing), WebEx offers the unique capability of using VoIP to transmit voice. It fully supports both H. 323 and SIP gateways in its architecture. Not only can you use VoIP technology, but you can also display real-time video for videoconferencing capabilities.

Essentially, WebEx Support Center is a carrier-class solution that offers an all-in-one, Web-based, firewall-friendly solution with integrated data, voice and video, providing users with the ability to share presentations, share documents, co-browse the Web, share applications and remotely control applications and desktops. Since it is a hosted model, Support Center service does not require hardware or software investments, IT resources or firewall reconfiguration. The solution is 100 percent Web-based and is cross-platform compatible, allowing Windows, Mac and Unix users to collaborate on applications running on different platforms. You can also do on-the-fly file transfers, enabling presenters to distribute an edited file to all participants at the end of a collaborative meeting.

Another important feature is permission-based desktop remote control, allowing technical support personnel to immediately diagnose and fix customer problems. Additionally, WebEx allows "spontaneous presenter delegation," which enables any attendee in a meeting to instantly become the presenter and share presentations, documents or applications resident only on his/her system. It also features centralized policy administration controls and detailed reporting tools. In addition, users can actually record and edit sessions, which can be a valuable resource for companies that wish to use recorded sessions as training tools.

The most important feature, in our opinion, is actually a new feature. WebEx Support Center now uses the new MediaTone network. Created with a carrier-class information-switching architecture, the MediaTone Network delivers optimal performance by routing communications across several WebEx switching centers. The result is a high-performance network that provides superb levels of service integration, security, personalization and performance.

For security, it offers secure, real-time, transient data exchange, so that presentations and documents need never be uploaded to an external server. In fact, the WebEx MediaTone Network integrates a scalable software and API architecture specifically designed for efficient delivery over their distributed network. The network features globally distributed hubs, 24x7 network load-balancing and 128-bit SSL encryption to ensure confidential online meetings. WebEx claims that all session contents are switched through the MediaTone Network, and are never persistently stored in the WebEx infrastructure, which obviously reduces the chances for theft of any private data. TMC Labs has used WebEx's products and services in the past for press meetings; and we have always been impressed with its feature set. Now, with the addition of integrated VoIP and videoconferencing over a load-balanced global network, TMC Labs has nothing but the highest regard for WebEx for their continual improvement of the breadth of features offered in their solution.

For information and subscriptions, visit [www.TMCnet.com](http://www.TMCnet.com) or call 203-852-6800.

Tom Keating, Chief Technology Officer & Executive Technology Editor, TMC

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**Industry Codes/Names: BUSN Any type of business; TELC Telecommunications**

**File Segment: TI File 148**

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**15/9/3 (Item 3 from file: 15)**

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**Facts, figures and first-rate call centers**

**Hollman, Lee**

**Call Center Magazine ? v16n2 ?pp: 28-41**

**Feb 2003**

**ISSN: 1064-5543 ?Journal Code: CCMA**

**Document Type: Periodical; Cover Story ?Language: English ?Record Type: Fulltext ?Length: 11**

**Pages**

**Special Feature: Illustration**

**Word Count: 4614**

**Abstract:**

A challenge facing many call center managers is to aggregate data in real-time from many different sources - automated call distributors (ACDs), workforce management software, e-mail and Web servers - to make timely and informed decisions that advance call center objectives. One example: Analytics tools can help agents recognize a cross-selling opportunity by noticing that a high number of customers who purchase PCs over the phone later purchase memory expansion modules on-line. A company's sales department can view the same data and instruct the phone agents to offer PC buyers a special promotion on memory expansion modules - thereby boosting revenue on the original sale. Analytics can also help troubleshoot customer problems. If agents receive frequent calls about a defective product, employees from various departments can view the rising call volumes from upset customers and react accordingly. This article focuses on analytics tools that collect data from multiple sources, like phone switches, e-mail and Web servers, CRM software and databases containing customer information.

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**Text:**

PRODUCTS

ANALYTICS

Leveraging real-time analytics tools may be your key to increasing employee retention, customer loyalty and agent efficiency.

Among the myriad of challenges that call centers face, garnering raw data about their customers and operations is not one of them. They can access mountains of call statistics from phone switches. They can, using CRM software, generate reports ad infinitum detailing what purchases customers make and customers' opinions about your service. Call monitoring tools can fill volumes with figures on agent talk time, hold time, post-- call wrap-up time, etc.

The challenge for call center managers, rather, is to aggregate data in real-time from these and other sources - your ACD, workforce management software, e-mail and Web servers - to make timely and informed decisions that advance call center objectives.

Example: Analytics tools can help agents recognize a cross-selling opportunity by noticing that a high number of customers who purchase PCs over the phone later purchase memory expansion modules on-line. Your company's sales department can view the same data and instruct the phone agents to offer PC buyers a special promotion on memory expansion modules - thereby boosting revenue on the original sale.

Analytics can also help you troubleshoot customer problems. If agents receive frequent calls about a defective product, employees from various departments can view the rising call volumes from upset customers and react accordingly.

Donna Fluss, principal for DMG Consulting, says analytics opens up key customer service data to sales, marketing and other departments within your organization.

"Sales and marketing departments don't take agents' comments very seriously," she says. "But if there's a process that automates the collection of that data, analyzes that data, expresses the data's relevance and allows the organization to take action, the input from the call center will be taken more seriously."

Vendors featured in this article offer "real-time analytics," tools that allow you to share the timeliest data with agents and other employees. But the term requires clarification.

Fluss and others note that it's hard to capture, analyze and prepare the data so that your organization can take action on the fly. The majority of real-time analytics software delivers data about customers' actions within five minutes of their occurrence. All of the vendors we interviewed say their products can update data within five to 15 minutes.

That's still a sufficient amount of time for agents to receive important information, such as the likelihood that a customer might purchase a given product or cease doing business with you.

"You've got to deliver analytics to agents while the customer's on the phone," says Mike Schroek, global iAnalytics leader for IBM Business Consulting Services. "To that extent, [analytics software] turns call centers into arms of marketing departments by enabling agents to ask the right questions to customers."

As useful as analytics can be to secure both sales and customer loyalty, the software can also help improve call center efficiency. By capturing data about agents' job performance, like how quickly and successfully they resolve each call, you can determine what aspects of customer service to enhance.

This article will focus on analytics tools that collect data from multiple sources, like phone switches, e-mail and Web servers, CRM software and databases containing customer information.

Given space constraints, we cannot describe every analytics product that generates reports containing information about agent performance or customer service trends. Many of these products have, and will continue to be, covered in separate product features (e.g., the analytics modules of call monitoring and CRM software vendors, which we described, respectively,

in our October and December 2002 issues). This article will address "real-time" analytics tools from vendors that are comparatively new to our pages or otherwise do not lend themselves to other feature topics.

In addition to detailing product functionality, the vendors we interviewed detail how best to use analytics to anticipate customers' needs, increase sales and sharpen agents' customer service skills. Here are their insights and opinions.

#### AN ASSORTMENT

##### OF ANALYTICS ANGLES

Bob Kelly, president and CEO of CenterForce Technologies (Bethesda, MD), explains why most call centers can benefit from integrating data with analytics software.

"If you're [managing] a simple center that handles inbound voice calls and the only thing you might need to know is how agents spend their time on the phone, you can get that from phone system reports," says Kelly. "But if I want to find out anything more complex, like the relationship between how agents use CRM or collections software and the number of sales dollars they earn per hour, I need analytics software."

Kelly adds that you don't need to manage a complex call center to gain a substantial ROI with analytics. If your center handles only inbound customer service calls, you can use the tools to determine the relationship between agents' call handling times and customers' satisfaction with the resolution of each call. You might find that shorter call lengths don't make for happier customers. Viewing agents' average handle time statistics from your phone switch can't help you to make such a distinction.

Analytics' effectiveness, say observers, hinges in part on figuring out what devices or sources to collect data from, and what data to collect.

"Seventy percent of the work is getting the data," says Michael Smith, group director of marketing for Informatica (Redwood City, CA). "The remaining 30% is defining what metrics you want to use."

Smith places analytics into three categories. The first is call statistics that you can find from a phone switch, like average speed of answer and call volumes. Category two comprises the quality of customer service, like how many customer service cases were opened or closed. The final category, focusing on agent performance, might detail who helped the most customers or attained the highest customer satisfaction ratings. Combining metrics from each category lets you determine agents' strengths and weaknesses.

But don't err by viewing agents' performance metrics only on an individual basis.

"The way to determine if an agent isn't performing up to standard is seeing what they've done relative to the objectives you've set and compared to other agents," says David Spindel, technology analyst for consulting firm Datamonitor (New York, NY).

He adds that analytics can help you assess how well agents perform relative to predefined objectives. If you set an hourly sales goal and note that agents consistently don't confirm as many sales as you expected, you might need to reassess that goal. If you find that the majority of agents exceed your goal, you can contemplate raising the bar.

Comparing agents' personal metrics can also help you identify and reward star performers, as well as agents who need additional training.

"Analytics by itself will not and cannot drive changes in agent behavior," says Rosemary Turley, vice president of marketing for Performix Technologies (Burlington, MA). "You need to take it one step further and make sure that the information that you gather translates into something that makes each individual in the organization a little more productive and a little more happy."

Analytics tools can also contribute to making your customers happier and your business more profitable. One common strategy is to focus on customers' purchase habits to determine what additional products they're interested in. Another is to identify trends in customer behavior, such as how often customers contact you through different media, what pages of your Web site they view and the nature of their communications with agents. Many companies combine both strategies to plan targeted marketing campaigns.

Office supply chain Staples used SAS' (Cary, NC) analytics software to study customers' spending habits. Staples found that customers who purchased items from the company's retail stores, Web site and through Staples' print catalogue bought more merchandise than customers who did their shopping through only one of those channels. By recognizing this trend, Staples encouraged customers to use more than one channel and boosted its sales.

If you use analytics to track customer behavior, be sure to pay special attention to extreme changes in customers' purchasing habits.

"Increasing purchases or decreasing them are indicators that the customer's situation is changing," says Mark Smith, president of Quadstone (Boston, MA). "It's an indication that something's going to change in a customer's life, or that they can make the decision that they've had enough [of your products or services]."

Smith isn't alone in his opinion. Kevin Cavanaugh, vice president of technology for Unica (Lincoln, MA), says that any major life event, such as a marriage or birth, can change a customer's spending habits.

Cavanaugh acknowledges that using analytics to secure customer loyalty is an "inexact science," adding that you can't expect to keep every customer. But he insists that the software can significantly strengthen customer loyalty.

"It gives you estimates of the likelihood that a customer is going to do something," he says. "And if you can retain even a few percent more customers, it has a huge value to your business."

#### ANALYZING YOUR ANALYTICS

##### SOFTWARE OPTIONS

All of the real-time products in this feature provide analytics related to multimedia communications between agents and customers. But some products have a specific functionality that might suit your business priorities.

If your focus is on boosting agent productivity, CenterForce Technologies and Performix Technologies let you share performance data with reps so they can identify their strengths and weaknesses. Products from CSG Systems (Englewood, CO), Informatica, Quadstone, SAS and Unica, by contrast, tend to emphasize maximizing sales opportunities and keeping customers.

That's not to say that you couldn't use analytics apps from any of the vendors mentioned above for both sharpening agents' customer service skills and generating revenue. But each developer's software has distinctive merits.

For example, we found that Performix Technologies offers additional modules for its analytics software to help you develop agents' skills after you've viewed statistics to assess their competence at their jobs. And Island Data (Carlsbad, CA) calculates the probability that customers will enter specific words together during a search of your on-line knowledge base to more accurately understand customers' requests.

But since all analytics software can offer valuable information about your call center, how can you choose between so many different products? Here's a quick overview of some of the options available to help you make an informed decision.

CenterForce Technologies' Centerforce Analyzer integrates with workforce management software from vendors like Blue Pumpkin, IEX, and RightForce, the last of which merged with CenterForce in November 2002. For outbound campaigns, you can use CenterForce Planner to forecast the number of agents you need during each shift. CenterForce Analyzer then compares the actions that agents are scheduled to perform, like answering calls or taking lunch breaks, to what they're actually doing.

To set criteria for evaluating agents, you can select Performance Indicators (PIs) in CenterForce Analyzer. Although the software originally included 17 Performance indicators to rate how well agents respond to inbound calls, the latest version includes 70. The newest PIs focus on agents' abilities to handle outbound calls and non-- real-time interactions (e.g., the number of outbound calls they make that end in a successful sale or the amount of time they spend answering e-mail.)

You can set goals for agents based on the Performance Indicators that you select. If you select a PI to find out how much time agents spend answering e-mail, you can set a goal requiring agents to respond to each e-mail message within one hour. The goals that you set appear alongside analytics that indicate if agents meet them on scorecards that you can e-mail to individual agents and groups of agents.

The latest version of CenterForce Analyzer also lets you and additional users set schedules for e-mailing scorecards to individual agents and groups of agents. Previous versions enabled only one user to set schedules for sending scorecards on a regular basis, such as daily, weekly or monthly.

CSG Systems' CSG ProfitNow! generates forecasts to predict customer behavior based on their purchase histories and conversations with agents. Agents can learn which customers might abandon your company. And they can view suggestions on how to win back their trust. The software also identifies your most profitable customers and recommends what additional products and services agents can offer them.

Agents view color-coded signals from their PC desktops to see the overall level of customer satisfaction. A red alert signals a high likelihood of customer abandonment. (Red alerts are based on data like how often customers call to complain and a history of difficulties they've had with your company's products and services.) The yellow signal indicates a reduced risk of customer attrition; green and blue denote the more profitable customers. Agents view strategies for handling each type of customer based on rules that you set. They might offer apologies and discounts to red-alert customers or pitch new or more expensive products to customers within the green to blue spectrum.

CSG ProfitNow! collects data about customers from sources like billing software and CRM software to create forecasts about customers based on

their purchase habits, how frequently they call and what topics they discuss with agents, among other factors. If the software finds that some customers are dissatisfied, it predicts how they might distance themselves from your company for up to 28 days. The software projects what products and services happy customers might request next for up to 56 days.

You can use CSG ProfitNow! as a standalone product or as a module of CSG Advanced Customer Service Representative (ACSR), a CRM software suite. If you license CSG ProfitNow! without ACSR, the software comes with CSG Configurator. CSG Configurator lets you integrate CSG ProfitNow! with billing and CRM software to collect the data needed for forecasts. CSG Configurator also enables you to enter the suggestions that agents view when they help the most disgruntled and most valuable customers.

Informatica lets you build an analytics suite one module at a time. You can begin with PowerCenter 6 to collect historical analytics and PowerCenterRT for real-time analytics. Both versions of PowerCenter work with Business Adapters series of modules that enable PowerCenter to collect data from sources like phone switches and CRM software from vendors including Oracle, PeopleSoft, SAP and Siebel.

You can use Informatica Warehouse to save data from both versions of PowerCenter. Informatica Warehouse automatically organizes that data into tables. The software lets you view separate reports that contain information like sales figures, how customers respond to marketing campaigns, and the content and frequency of customer support calls and Web-based communications. Informatica Warehouse also includes 50 reports for generating metrics based on the data that you save from PowerCenter.

Informatica's PowerAnalyzer lets users view data from a Web browser-based dashboard. The software includes a setup wizard to define what analytics to display and how often to display them. To learn how many customers from a given location are responding to a promotional offer, you can set rules using the wizard to view hourly updates on call volumes for customers from that venue.

The analytics options available with knowledge management software can provide you with valuable insights about customers based on their on-line behavior. OneStep from iPhrase (Cambridge, MA) lets you find information that customers request with User Summary, User Intelligence and Content and Knowledge Gap reports.

User Summary reports enable you to determine the success of customers' on-line searches based on the answers they receive. These reports indicate how often OneStep provides customers with text answers; routes customers to relevant Web pages; and generates dynamic reports containing information from Web pages and knowledge base content in response to a search request. User Intelligence reports the most popular customer search requests and the answers that OneStep provides most frequently to customers.

Content and Knowledge Gap reports let you determine which search requests OneStep doesn't provide answers for. You can identify the words that customers enter for each unsuccessful search. And you can enter those words into OneStep so the software can recognize them to complete future searches successfully.

Content and Knowledge Gap reports also include Buried Content, a report that displays how many pages of your Web site customers view, starting from your home page, to find information they want. Buried Content provides an analysis of Web site visitors' behavior that can help you redesign your site more efficiently. So if you find that most visitors click to the third

page of your site to download a brochure, you can decide to include the brochure on your home page for more immediate access.

#### Stats aplenty: Informatica's PowerAnalyzer

Another vendor of self-service software, Island Data, offers Insight RT. The product's Concept Recognition Engine analyzes the text of customers' e-mail messages and on-line forms that they fill out. Insight RT recommends an action based on its analysis of the text.

You enable Insight RT to assess the content of customers' messages by entering "seed words" from a setup wizard. For example, it's not often that customers write, "I want to buy your product." They're more likely to write something like, "How much does this product cost?" By entering the product name and "cost" as seed words, Insight RT can recognize them in the body of an email message or an on-line form and identify it as a sales lead.

The software also includes a lexicon of words and analyzes the statistical likelihood that specific words will appear together in the same message. When you enter seed words, the software presents you with sample sentences in which those words might appear. If you enter "subscribe" and "cable TV service," the software will automatically identify sentences like "I want to subscribe to your cable TV service." You select which sentences accurately represent what customers are likely to say.

Insight RT then analyzes text from customer feedback and rates each sentence with a percentage value to indicate the likelihood that it's a specific type of message. A sentence as dear as "I want to subscribe to your cable TV service" could receive a value of 100 to categorize the message as a definite sales lead. You can then set rules to enable agents to take specific actions based on these scores. If you integrate Insight RT with CRM software, you can evaluate a large volume of customer inquiries, and only insert the highest-scored opportunities into the CRM queue for agents' immediate attention.

The Dashboard feature of Insight RT lets you track data like customers' on-line browsing behavior and purchasing habits. Dashboard updates this data every ten to 15 minutes and displays it from customizable graphs and charts that call center managers and your company's sales and marketing departments can view from their desktops. The software can also generate reports containing historical data; and can integrate with third-party reporting software like Seagate Software's Crystal Reports.

Jeeves Solutions (Emeryville, CA) lets you determine how effective your Web-based self-service is with the Analytics module of the company's knowledge management software, JeevesOne. Analytics include templates for 107 reports that can encompass the number of self-service sessions that customers successfully complete, abandon or escalate to receive assistance from agents.

Your reports can also contain the content of customers' on-line searches and the information that JeevesOne provides them after each search. You can also add customer profiles to each report to determine which visitors to your Web site who use the self-service option are new or repeat customers; are from specific geographical regions; or have purchased selected products and services.

Analytics recognizes specific words and sentences, or paraphrases of them, which customers enter to search an on-line knowledge base that you create using JeevesOne. Analytics then assigns percentage values for each customer search. You set thresholds based on these values so that if Analytics assigns a given percentage value to customers' search words, agents receive e-mails containing a list of the

words and phrases customers use for their online searches. If you set a threshold of 90% for e-mails that contain possible sales leads, the e-mail agents receive could include customers' questions about the pricing and warranty for a given product.

You can improve the accuracy of each customer search from JeevesOne by entering into a setup wizard the words, phrases and sentences that customers are most likely to use in a search. The software generates paraphrases so that it can recognize different ways of requesting the same information. If you find that customers are phrasing their requests for information in a way that JeevesOne didn't predict, Analytics lets you view the verbatim inquiries that JeevesOne didn't recognize and prioritizes them based on how frequently they occur.

For monitoring and improving agent performance, Emvolve from Performix Technologies includes the Performance Review module. Performance Review provides agents with a scorecard they view through a Web browser to see how closely they meet call center goals, like sales quotas or the number of customer service requests they resolve daily.

Emvolve's Key Performance Indicators offer you a global perspective of your call center's performance statistics. You click on a particular statistic to view additional details. If you notice a rise in the number of call abandonment rates at your center, you can click on that figure to find the abandonment rates for each team of agents. You can then click again to find the same information about individual agents working for a given team. The software also works with multi-site call centers so that you can measure the performance of call centers from separate locations.

Other modules in Emvolve help you to rate agents' performance. Competency Review allows you to assign scores for each agent based on categories that you set, like politeness and attentiveness. You can also allow agents and their coworkers to score themselves and each other to gain insights about what they think their strengths and weaknesses are.

To further sharpen agents' performance, Personal Development automatically indicates the areas that agents need to improve upon, like sales technique and quality of service. And if you want to encourage agents to continue their good work, Reward and Recognition calculates the bonuses that agents receive for meeting the goals that you set with Performance Review.

The newest version of Quadstone's Quadstone System suite works with J2EE and Java 3D so that you can set the analytics you want to keep track of from a wizard and view them in 3D charts. Quadstone System also supports XML so that your company's IT staff can create customized interfaces, enabling the software to collect statistics from multiple sources.

Decisionhouse, the centerpiece of Quadstone System, lets you view information about customer behavior. You can, for example, enter an inquiry as basic as tracking the number of calls agents answered for a given day, week or month; or as specific as the number of customers from New Jersey who asked technical support questions on Mondays from 9 am to noon. Decisionhouse then displays the data you request as a customized chart or graph.

The Transactionhouse module collects the data that you view using Decisionhouse from sources like phone switches, databases containing customer information and CRM software from vendors like Onyx and Siebel. Transactionhouse can also track the Web pages that customers visit. Rounding out the Quadstone System, Actionhouse lets agents automatically take specific actions based on thresholds you set and on data that Decisionhouse collects. The software also integrates with other vendors'

software to enable agents to take these actions. You can, for example, set a threshold for a maximum hold time of two minutes using Actionhouse. But if Decisionhouse finds that some customers remain on hold for more than two minutes, Actionhouse can work with your CRM software to provide agents with a call script, including an apology for the delay in response.

#### Flag profitable customers with Unica's Affinium Model

SAS Interaction Management lets you track individual customers' behavior during a timeframe that you set, like how often they call your company on a monthly basis. The software can additionally collect data about customers, like histories of their purchases and their communications with agents.

SAS Interaction Management enables agents to take actions based on predefined rules by selecting options from a drop-down menu. Using the previous example of tracking customers' monthly calls, you can set a rule requiring that agents contact customers who've made a marked rise or decline in their monthly call volumes to inquire if they're satisfied with the service they've received.

You can use SAS Interaction Management with SAS Marketing Automation, software to identify target audiences for outbound marketing campaigns. The software provides you with a Java-based user interface to determine which customers might respond to a given offer, based on their prior purchases. SAS Marketing Automation suggests the best times and dates to contact customers. And it recommends what products and services might appeal to them.

Unica's Affinium Model comprises four modules featuring sales-related analytics. The tools help you determine who your most valuable customers are and how to make interactions with each more profitable. The software is available as a standalone product or as a module of the Affinium software suite for predicting customer behavior and designing marketing campaigns.

The Customer Valuator module enables you to predict the lifetime value of customers based on their demographic profiles and previous purchases. Response Modeler applies the same data to help you answer questions about customers (e.g., whether they pose a credit risk; are likely to discontinue their business relationship with your company; or whether they'll take advantage of a promotional offer).

You can define customer demographics with Market Segmenter/ Profiler based on the specific products or types of products that customers purchased and how much money they spend. Rounding out Affinium Model's analytics options, Cross Seller lists customers' purchases and predicts what items they'll probably consider buying next.

Need More Data

About Analytics

Software?

Take a closer look at the analytics products mentioned in this feature by contacting the vendors below.

CenterForce Technologies

301-718-2955

[www.cforcetech.com](http://www.cforcetech.com)

CSG Systems

800-366-2744/303-796-2850

[www.csgsystems.com](http://www.csgsystems.com)  
Informatica

650-385-5000

[www.informatica.com](http://www.informatica.com)

iPhrase

617-577-4300

[www.iphrase.com](http://www.iphrase.com)

Island Data

760-517-4100

[www.islanddata.com](http://www.islanddata.com)

Jeeves Solutions

866-JEEVES-1/510-985-7400

[www.jeevessolutions.com](http://www.jeevessolutions.com)  
Performix Technologies

877-637-3063/781-238-3500

[www.performixtechnologies.com](http://www.performixtechnologies.com)

Quadstone

800-821-8031/617-457-5200

[www.quadstone.com](http://www.quadstone.com)

SAS

919-677-8000

[www.sas.com](http://www.sas.com)

Unica

781-259-5900

[www.affinium.com](http://www.affinium.com)  
Self-Service

Analytics

Knowledge management software lets visitors to your Web site find information on their own. When combined with analytics software, knowledge management applications can improve visitors' self-service experiences to reduce your company's overhead and increase customer satisfaction.

"Analytics allows you to take the guesswork out of determining what

customers are trying to find by providing a way for you to examine exactly what information your customer is attempting to access," explains Andre Pino, senior vice president of marketing for iPhrase (Cambridge, MA).

For example, consider how pharmaceutical firm Novardis used Jeeves Solutions' (Emeryville, CA) JeevesOne software with the Analytics module. Novardis observed high abandonment rates among knowledge base users and a subsequent rise in call volumes. The company reviewed the text of customers' unsuccessful searches that users conducted before calling agents about the side effects of prescription drugs. Novardis then entered the words and phrases that customers used for those searches, enabling JeevesOne to recognize them so that customers could more easily find information about side effects.

James Speer, director of product marketing for Jeeves Solutions, says that Novardis provides a textbook example of how you can use analytics software to improve Web-based self-service.

"The big thing is to look at the number of interactions where the overall session was less than desirable," he explains. "By tracking the [self-service] sessions, if you find that 40% of transactions result in escalation [to agents], those are the key metrics you need to work with."

But no knowledge base can contain all the answers. "The customer should be allowed to go to the next best possible options for service, which include an escalation to an agent," says Norm Williams, president and CEO of Island Data (Carlsbad, CA).

We want to hear from you! Please e-mail: lhollman@cmp.com.

## **THIS IS THE FULL-TEXT.**

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**Geographic Names: United States; US**

**Descriptors: Call centers; Real time; Data collection; Manyproducts; Sales management; Retention; Customer relationship management**

**Classification Codes: 9190 (CN=United States); 5240 (CN=Software & systems); 7300 (CN=Sales & selling); 6100 (CN=Human resource planning)**

**Print Media ID: 42689**

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**15/9/4 (Item 4 from file: 275)**

**02687052 ? ? Supplier Number: 97483132 (This Is The FULL TEXT )**

**Customer Inter@ction Solutions' 2002 Product of the Year Awards. (Call Center/CRM Management Scope).(Buyers Guide)**

**Customer Interaction Solutions , 21 , 7 , 44(4)  
Jan , 2003**

**Document Type: Buyers Guide**

**ISSN: 1533-3078**

**Language: English ? ? Record Type: Fulltext**

**Word Count: 3760 ? ? Line Count: 00364**

**Text:**

Each year, Customer Inter@ction Solutions(R) magazine bestows its Product of the Year awards on companies that have demonstrated excellence in technological advancement and application refinements. These are products and services that have gone the extra mile to help improve both the customer experience and the ROI for the companies that use them.

In this time of shrinking budgets, every dollar spent on technology is precious, so it is viral that capital investment in technology and services be invested as wisely as possible in order to speed return on investment and improve the business processes and bottom line of the companies that purchase these technologies.

To this end, the editors of Customer Inter@ction Solutions(R) have compiled a list of the best of the best for our readers. These products span a range of product categories, but all represent the top of the heap in their chosen arenas. As always, we encourage you to do research to help you select those technologies and companies that best suit your company's business needs and, ultimately, your most important company asset of all -- your customers.

ACCPAC International, Inc.

Pleasanton, CA

[www.accpac.com](http://www.accpac.com)

ACCPAC eCRM

ACCPAC eCRM is an integrated sales, marketing, customer support and call center automation solution. It is completely Internet- and WAP-enabled, helping provide users access anytime, anywhere via a Web browser.

Acxiom Corporation

Little Rock, AR

[www.acxiom.com](http://www.acxiom.com)

PersonicaX

PersonicaX is a household-level segmentation system that places each U.S. household into one of 70 life stage segments, based on its specific consumer and demographic characteristics, allowing a greater precision of targeted marketing and true accuracy of segmentation.

Advanced Information Systems, Inc

Las Vegas, NV

[www.aisinfo.com](http://www.aisinfo.com)

iBizFlow

iBizFlow is an open, XML-based business rule engine providing scalable, redundant business solutions. Using iBizFlow, businesses are better able to create a single set of business rules that are applied to processes regardless of processing media.

Applied Innovation Management

Las Vegas, NV

[www.lizsystems.com](http://www.lizsystems.com)

LIZ

LIZ combines state-of-the-art computer-telephony integration hardware with powerful help desk software in one compact unit, bringing 24-hour voice automation capabilities to the call center.

Apropos Technology

Oakbrook Terrace, IL

[www.apropos.com](http://www.apropos.com)

Apropos Version 5

Apropos helps empower organizations by providing real-time knowledge about each customer interaction. Whether it's a phone call, email, Web or fax interaction, Apropos provides information about who initiates contact and why, plus the current status, resolution and pending tasks.

Aspect Communications

San Jose, CA

[www.aspect.com](http://www.aspect.com)

Aspect eWorkforce Management

Aspect eWorkforce Management (eWFM) v6.2 provides an enhanced mission-critical architecture and new functionality required for staffing today's cost-conscious contact centers.

Austin Logistics Inc.

Austin, TX

[www.austinlogistics.com](http://www.austinlogistics.com)

CallSelect

CallSelect software from Austin Logistics quantifies the impact of collection calls and other actions to help maximize dollars collected and agent productivity.

Authoria, Inc.

Waltham, MA

[www.authoria.com](http://www.authoria.com)

Authoria HR 3.5

Authoria HR 3.5 is the next generation of Authoria's flagship software that delivers intelligent, personalized Web-based answers to employee benefit and HR policy questions.

Avaya

Basking Ridge, NJ

[www.avaya.com](http://www.avaya.com)

Avaya Interaction Center

Avaya Interaction Center 6.0 is the core product of Avaya's Multimedia Contact Center solution, allowing consistent service across multiple channels and multi-vendor environments.

Avolent

San Francisco, CA

[www.avolent.com](http://www.avolent.com)

BizCast 5.0

BizCast 5 offers technology to streamline the entire invoice-to-pay process. BizCast 5 is an EIPP enterprise software solution for companies wanting to add invoice-to-pay automation to existing Internet-based e-commerce applications.

BEST Software's ACT!

Scottsdale, AZ

[www.act.com](http://www.act.com)

ACT! 6.0

ACT! is a contact management database product.

Blue Pumpkin

Sunnyvale, CA

[www.bluepumpkin.com](http://www.bluepumpkin.com)

Blue Pumpkin Workforce

Optimization Suite

Blue Pumpkin's Workforce Optimization Suite is a closed-loop system to accelerate employee and organizational performance. It was designed to perfect "the science behind the art of managing people."

Brooktrout Technology

Needham, MA

[www.brooktrout.com](http://www.brooktrout.com)

RealBLOCS DR-A

Brooktrout Technology's RealBLOCS DR-A is a call recording platform that emphasizes recording accuracy and clarity for building scaleable, open system, call logging and quality monitoring applications.

Call Compliance, Inc.

Glen Cove, NY

[www.callcompliance.com](http://www.callcompliance.com)

TeleBlock Do-Not-Call Blocking System

Call Compliance's patented TeleBlock system is the first and only blocking product that automatically screens and blocks outbound calls against state, in-house and third-party do-not-call and do-not-fax lists.

CenterForce Technologies, Inc.

Bethesda, MD

[www.cforcetech.com](http://www.cforcetech.com)

CenterForce Analyzer

CenterForce Analyzer measures agent, team and contact center performance against user-defined goals, providing immediate browser and e-mail based access to accurate, well-organized performance results.

Clear Technologies

Coppell, TX

[www.clearc2.com](http://www.clearc2.com)

C2 CRM

C2 CRM helps mid-market companies increase organizational efficiency, strengthen customer loyalty, boost sales, improve business processes and increase marketing effectiveness, and is Web-based for maximum accessibility.

Concerto Software

Westford, MA

[www.concerto.com](http://www.concerto.com)

ContactPro 4.2

Concerto's ContactPro 4.2 leverages real-time knowledge about customer relationships in delivering a personalized, consistent experience across all communication channels -- voice, fax, e-mail and the Web.

CosmoCom

Melville, NY

[www.cosmocom.com](http://www.cosmocom.com)

CosmoCall Universe

CosmoCall Universe (CCU), is a carrier-class system providing next-generation capabilities for mission-critical contact center applications. CCU supports multichannel customer interactions via telephone and Internet.

Data-Tel Info Solutions

Mesa, AZ

[www.datatel-info.com](http://www.datatel-info.com)

xSELLerator 6.0

Data-Tel's xSELLerator 6.0 is a contact center suite for inbound, outbound and Web-bound call blending.

Digisoft Computers, Inc.

New York, NY

[www.digisoft.com](http://www.digisoft.com)

Telescript 5.4

Telescript 5.4 is a modular and scalable call center management solution designed to integrate with telephone, database and other call center-related systems.

Discern Communications

Menlo Park, CA

[www.discern.com](http://www.discern.com)

Discern

Discern is a customer self-service application that interprets customers' Web-based or spoken queries and provides them direct answers from multiple information sources. Language-understanding capabilities automate question answering at the entry point of customer service.

divine, Inc.

Chicago, IL

[www.divine.com](http://www.divine.com)

divine MindAlign 2002

divine MindAlign is a secure, real-time collaboration tool that combines chat and instant messaging to provide a community-based communication medium.

eAssist Global Solutions, Inc.

San Diego, CA

[www.eassist.com](http://www.eassist.com)

eAssist Solution Suite 2.1

The eAssist Solution Suite is a fully integrated suite of customer care software and services; it enables companies to gain a unified view of

their customers across geographies, products and points of interaction.

Edify Corp.

Santa Clara, CA

[www.edify.com](http://www.edify.com)

Edify 8

Edify 8.0 is a comprehensive multi-channel platform including CRM applications and infrastructure components that automate, assist and analyze customer interaction across all touchpoints and for all modes of communication including voice, wireless and Web.

eGain

Sunnyvale, CA

[www.egain.com](http://www.egain.com)

eGain Live Web 5.0 suite

eGain Live Web 5.0 is a suite for real-time assisted customer service over the Web. It provides applications for chat, co-browsing, remote diagnostics and repair, and online meetings.

Empirix

Waltham, MA

[www.empirix.com](http://www.empirix.com)

Hammer On-Call

Hammer On-Call testing services help contact centers find and resolve scalability problems before they adversely affect operational performance and customer satisfaction.

enGenic Corp.

Vancouver, BC

[www.engenic.com](http://www.engenic.com)

TaleFlow 2003

TaleFlow 2003 is a voice application development suite designed to remove the complexity of building voice solutions -- such as call management, interactive voice response (IVR), voice mail, call centers, computer-telephony integration (CTI) and voice portals -- by encapsulating complex functions into simple-to-understand icons.

Envision Telephony, Inc.

Seattle, WA

[www.envisiontelephony.com](http://www.envisiontelephony.com)

Click2Coach MultiSite Edition

Click2Coach is a software solution designed to provide integrated qualify monitoring, training and motivation tools to help develop effective, well-trained agents.

eOn Communications

Kennesaw, GA

[www.eoncommunications.com](http://www.eoncommunications.com)

eQueue Multi-Media Contact Center Solution

eOn's eQueue Multi-Media Contact Center Solution offers a comprehensive and unified solution for customer interaction management (CIM). The universal or single queue approach enables contact centers to efficiently interact with their customers, regardless of the media they choose for communication.

ePeople

Mountain View, CA

[www.epeople.com](http://www.epeople.com)

ePeople Teamwork

ePeople Teamwork 4.0 is a Web-based, collaborative customer support application that enables cross-functional teams to better service customers. There are four modules that make up the ePeople Teamwork application: Team Sourcing, Team Workspace, Team Analytics and Team Resolution Engine.

Epicor Software Corp.

Irvine, CA

[www.clientele.epicor.com](http://www.clientele.epicor.com)

Clientele Customer Support 8.0

Clientele Customer Support 8.0 is a complete call management solution

for supporting external customers, and is built entirely on the Microsoft .NET platform.

EPOS Corp.

Auburn, AL

[www.epos.com](http://www.epos.com)

Call Center Director

Call Center Director is designed for small to medium-sized call centers that wish to improve customer satisfaction and agent efficiency through the use of screen pops and case management integration.

e-talk Corp.

Irving, TX

[www.etalik.com](http://www.etalik.com)

Qfiniti

The e-talk Qfiniti platform empowers customer contact centers with a comprehensive and integrated qualify management solution for the enterprise.

Expertcity, Inc.

Santa Barbara, CA

[www.desktopstreaming.com](http://www.desktopstreaming.com)

Desktop Streaming Phone Mode DesktopStreaming is a Web-based service that allows businesses to remotely assist their customers or employees and conduct online sales demos, It enables shared screen, mouse and keyboard control without installing software on the users computers.

Firepond, Inc.

Minneapolis, MN

[www.firepond.com](http://www.firepond.com)

Firepond eServicePerformer Suite 2002

Firepond's eServicePerformer 2002 system delivers online customer service in a way that deflects customers from costly assistance channels, It provides immediate, accurate and qualified responses, regardless of contact channel.

Firstwave Technologies

Atlanta, GA

[www.firstwave.net](http://www.firstwave.net)

Firstwave eCRM

Firstwave eCRM is a 100 percent Web-based CRM application designed to make marketing, sales and service organizations more efficient by streamlining processes and building solid relationships with customers and prospects.

FurstPerson

Chicago, IL

[www.furstperson.com](http://www.furstperson.com)

FurstSelect Hiring System

The Web-based FurstSelect Hiring System is an integrated, end-to-end staffing solution designed exclusively for the call center environment.

Fused Solutions

Potsdam, NY

[www.fusedsolutions.com](http://www.fusedsolutions.com)

FS-Virtual Agent

FS-Virtual Agent is a Web-driven, self-service contact-center application designed to provide level one and level two technical support by front-ending a custom-built knowledge base used by Fused Solutions' live agents.

Genesys Telecommunications Labs, Inc.

Daly City, CA

[www.genesyslab.com](http://www.genesyslab.com)

Genesys Voice Portal

Genesys Voice Portal is an advanced software-only product designed to bring Internet technologies to the world of voice, helping deliver voice self-service applications. It removes the constraints of legacy IVR systems and offers standards-based development, flexible deployment options, simplified integration and improved time to market for speech-directed

voice applications.

GMT Corp  
Norcross, GA  
[www.gmt.com](http://www.gmt.com)

GMT Planet -- Jupiter Edition 8.02

GMT Planet -- Jupiter Edition is a workforce management software for call centers, multimedia contact centers, financial institutions, processing centers, service industries and the entire enterprise. Includes real-time adherence, compliance reporting and a meeting planner.

GN Netcom, Inc.  
Nashua, NH  
[www.gnnetcom.com](http://www.gnnetcom.com)  
GN 9050

The GN 9050 is a headset designed to allow professionals the mobility and freedom to answer, conduct and end calls from 150 feet away from their telephones. The new system features 2.4 GHz Digital Spread Spectrum (DSS) technology for secure communications.

IEX, a Tekelec company  
Richardson, TX  
[www.iex.com](http://www.iex.com)

Total View Workforce Management Version 3.3

Multimedia contact centers, both single and multisite, rely on TotalView Workforce Management to improve service levels while lowering operating costs.

Inova Corp.  
Charlottesville, VA  
[www.inovacorp.com](http://www.inovacorp.com)

LightLink Direct LED Displays LightLink LED displays are network ready, full matrix displays optimized for maximum readability and viewing distance. They feature bright LED technology, large display characters and a wide viewing angle. In addition, they are equipped with an integrated Ethernet TCP/IP connection.

Island Data  
Carlsbad, CA  
[www.islanddata.com](http://www.islanddata.com)

nSight RT

nSight RT captures customer feedback from various sources, analyzes the concepts and intent of the unstructured feedback, and converts the feedback into insights that can be acted upon in real-time.

Kaidara Software  
Los Altos, CA  
[www.kaidara.com](http://www.kaidara.com)

Kaidara Advisor

Kaidara Advisor is an advanced application for complex product support. It helps enable organizations to efficiently share expert knowledge across language and geographic boundaries and provide consistent responses to inquiries regardless of the user's preferred language.

KANA  
Menlo Park, CA  
[www.kana.com](http://www.kana.com)

KANA Response 7.5

KANA Response software version 7.5 helps enable global enterprises to provide immediate and effective response to customer inquiries in most major languages. One of the modular solutions that make up the KANA CARE suite of products, KANA Response 7.5 is the latest in a series of product releases dedicated to providing features and functionality that meet the needs of global enterprises.

KnowledgeBase Solutions, Inc.  
Los Angeles, CA  
[www.knowledgebase.net](http://www.knowledgebase.net)

KnowledgeBase.net

KnowledgeBase.net combines the most relevant features of document and

knowledge management, customized portals and search technology to deliver a comprehensive support self-service knowledge base.

Linktivity, a division of SpartaCom Technologies

Tucson, AZ

[www.linktivity.com](http://www.linktivity.com)

WebDemo

WebDemo is a Web-based, real-time collaboration tool designed to provide a simple way for presenters to deliver online presentations from their desktops and to interact with an audience of remote participants, all of whom require nothing more than a PC and an Internet connection.

LumenVox

San Diego, CA

[www.lumenvox.com](http://www.lumenvox.com)

Speech Driven Information System Speech Driven Information System (SDIS) is an easy-to-use GUI wrapped around LumenVox's Speech Recognition Engine (SRE). It was designed to allow companies to develop their own speech recognition application in three easy steps.

Mitel Networks

Ottawa, ON

[www.mitel.com](http://www.mitel.com)

Mitel Networks 6150 Multimedia Contact Center

The 6150 is a modular offering that integrates with Microsoft Exchange 2000 and Outlook 2000 to support automatic e-mail routing, historical reporting and real-time monitoring of all contact types.

MoonFire Corp.

Mead, CO

[www.dialvision.com](http://www.dialvision.com)

DialVision

DialVision is a 100 percent Web-based CIM/telemarketing software application designed to be accessed through the Internet Explorer Web browser.

Motive Communications

Austin, TX

[www.motive.com](http://www.motive.com)

Motive Enterprise Software Service Suite

Motive's Enterprise suite enables vendors to build intelligent service directly into their software applications. Designed to deliver proactive, targeted assistance throughout the customer lifecycle, these solutions were designed to enable software vendors to increase revenue.

Multima Corp.

East Greenwich, RI

[www.netkeeper.com](http://www.netkeeper.com)

Net Keeper HD Mail Pro v7.5

Net Keeper HD Mail is an automatic incoming e-mail processing system designed to cut the cost of running a customer service center.

NativeMinds, Inc.

San Francisco, CA

[www.nativeminds.com](http://www.nativeminds.com)

NeuroServer 3.5

Unlike traditional natural language search engines that scan Web sites and return long lists of results, NeuroServer 3.0 enables virtual service agents to gauge customers' questions based on question type, tone and customer history, and answer precisely with accurate, personalized replies.

NetByTel

Boca Raton, FL

[www.netbytel.com](http://www.netbytel.com)

OpenVoice Application Platform NetByTel's OpenVoice Application Platform includes application and functional components and is used exclusively by NetByTel to design, build, deploy, enhance and manage sophisticated, high-quality phone self-service solutions.

NICE Systems

Rutherford, NJ

[www.nice.com](http://www.nice.com)

**Business Analyzer**

NICE's Business Analyzer capabilities combine state-of-the-art technologies including automatic speech recognition (ASR), word spotting and stress/emotion analysis to enable businesses to extract the spoken and unspoken content from interactions.

Nortel Networks

Richardson, TX

[www.nortelnetworks.com](http://www.nortelnetworks.com)

Symposium Call Center Web Client Nortel Networks Symposium Call Center Web Client is a new, browser-based thin client introducing management tools which better equip call center managers to make improved business decisions and respond faster to customer needs.

Nuance Communications

Menlo Park, CA

[www.nuance.com](http://www.nuance.com)

Nuance 8.0

Nuance 8.0 is an accurate, scalable and reliable speech recognition software product.

Oncontact Software

Cedarburg, WI

[www.oncontact.com](http://www.oncontact.com)

Client Management Software - Version 6.0

Client Management Software (CMS) is Oncontact Software's CRM system for mid-market companies. OMS houses the critical business information an organization needs to develop effective sales, marketing and customer service strategies.

Oracle Corp.

Redwood Shores, CA

[www.oracle.com](http://www.oracle.com)

Oracle Service Contracts

Oracle Service Contracts enables users to create and manage service contracts, warranties and extended warranties. It makes contract entitlements visible, and it acts on contractually specified commitments.

Pivotal Corp.

North Vancouver, BC

[www.pivotal.com](http://www.pivotal.com)

Pivotal Contact Center

By leveraging client data across the organization, Pivotal Contact Center was designed to transform tactical call centers into strategic contact centers, delivering more personalized, "one and done" interactions at lower costs, resulting in increased revenues, margins and customer loyalty.

Princeton Softech

Princeton, NJ

[www.princetonsofttech.com](http://www.princetonsofttech.com)

Princeton Softech's Archive for Servers

Princeton Softech's Archive for Servers supports the leading database management systems, including Oracle, DB2/UDB, SQL Server, Sybase and Informix and provides the capabilities needed to implement an effective active archiving strategy.

Pronexus Inc.

Ottawa, ON

[www.pronexus.com](http://www.pronexus.com)

Voice 5.0

Voice 5.0 is a telephony development environment to leverage the power of Microsoft Visual Studio. Net. It features support for voice over IP (VoIP), comprehensive telephony controls such as speech recognition and text-to-speech and a highly scalable architecture.

Prosodie Interactive

Fort Lauderdale, FL

[www.prosodieinteractive.com](http://www.prosodieinteractive.com)

FasTrack

Prosodie Interactive's FasTrack is a "find-me, follow-me, connect-me" communications service. Using proprietary technologies, FasTrack unifies all telecommunications -- work, home, cellular, pager, voice mail and fax -- into one number.

RightNow Technologies, Inc.

Bozeman, MT

[www.rightnow.com](http://www.rightnow.com)

RightNow Locator 2.0

RightNow Locator 2.0 is an advanced solution for providing customers with information about sales and service locations over the Web.

Rockwell FirstPoint Contact

Wood Dale, IL

[www.rockwellfirstpoint.com](http://www.rockwellfirstpoint.com)

FirstPoint Business Edition

FirstPoint Business Edition lowers the cost of entry for small to medium-size businesses by up to 30 percent by providing an "out-of-the-box," multichannel contact center solution, with all of the flexibility, functionality and integration offered to large companies.

[salesforce.com](http://salesforce.com)

San Francisco, CA

[www.salesforce.com](http://www.salesforce.com)

[salesforce.com](http://salesforce.com)

Enterprise Edition

[salesforce.com](http://salesforce.com)

Enterprise Edition allows companies to simplify and standardize complex customer operations through a single online solution that can be deployed across multiple departments and divisions -- without requiring the purchase or installation of a single line of code.

SAP

Newtown Square, PA

[www.sap.com](http://www.sap.com)

mySAP CRM

With mySAP CRM, SAP delivers an integrated CRM solution designed to align and connect employees, partners, business processes, information and technology within a closed-loop customer-interaction cycle.

SAS Institute, Inc.

Cary, NC

[www.sas.com](http://www.sas.com)

SAS Marketing Automation Release 2.2

SAS Marketing Automation combines data warehousing, advanced analytics and campaign planning/ management methodologies to synthesize customer data across all lines of business.

Siemens Information and Communication Networks

Reston, VA

[www.siemensenterprise.com](http://www.siemensenterprise.com)

HiPath ProCenter Suites

The newest release of Siemens HiPath ProCenter solution offers "real world" CRM features such as a new graphical user interface for business rules routing, Web collaboration and e-mail fully-integrated at the agent/supervisor desk.

Spanlink Communications

Minneapolis, MN

[www.spanlink.com](http://www.spanlink.com)

EagleView Reporting Engine

EagleView is a secure, scalable, Web-based reporting engine that allows contact centers to incorporate data from any compliant data source.

Spectel

Andover, MA

[www.spectel.com](http://www.spectel.com)

Spectel MeetingManager

Especially designed for small to medium-sized businesses, the Spectel MeetingManager platform provides anytime, anyplace voice conferencing for up to 60 concurrent participants.

Spectrum Corp.

Houston, TX

[www.specorp.com](http://www.specorp.com)

IP Wallboards

The 3004 series is a collection of two-line wallboards, with IP address-ability, for the call center industry.

Stratasoft, Inc.

Houston, TX

[www.stratasoft.com](http://www.stratasoft.com)

StrataDial VC2 -- Virtual Contact Center

StrataDial VC2 -- Virtual Contact

Center is a set of essential telephony applications, including outbound predictive dialing, inbound automatic call distributor, voice mail and an auto-attendant on an open standards-based, application-ready platform.

SupportSoft

Redwood City, CA

[www.supportsoft.com](http://www.supportsoft.com)

Resolution Suite

SupportSoft's Resolution Suite Web-based software was designed to help enterprises automate the support process for their employees by quickly identifying problems and automatically resolving them.

SYMON Communications, Inc.

Sugar Land, TX

[www.symon.com](http://www.symon.com)

Contact Center COMMUNITY 2.0

Contact Center COMMUNITY 2.0 is a 100 percent Web-based workforce management solution that provides timely contact center schedules and performance data to agents and supervisors in both local and remote settings.

TeleDirect International, Inc.

Scottsdale, AZ

[www.tdirect.com](http://www.tdirect.com)

DialogGuide

The Dialog Guide, a component of Dialog Manager, is divided into three different viewing panels for agents: Data Display Panel, Call Flow Topics Panel and Action/Statistics Panel. The layout was designed to improve navigation and reduces the agent's learning curve.

Telephony @ Work

La Jolla, CA

[www.telephonyatwork.com](http://www.telephonyatwork.com)

CallCenter @ nywhere Version 6.0 CallCenter @ nywhere is an integrated communications server platform that can integrate or replace legacy switching infrastructures. The platform provides infrastructure for, and applies skills-based routing discipline to, every medium of communication, including inbound phone calls, faxes, e-mail, voice mail, chat sessions, Web callback and voice over P transactions.

Teloquent Communications

Billerica, MA

[www.teloquent.com](http://www.teloquent.com)

Teloquent Interchange 6.0

A browser-based interaction platform, Interchange provides voice, email and Web-based contact, integrated with any customer relationship management (CRM) application.

Ulysses Learning

Mooresville, NC

[www.ulyseslearning.com](http://www.ulyseslearning.com)

CallMentor

CallMentor is a complete simulation-based e-learning system for service, sales and coaching.

VBrick Systems

Wallingford, CT

[www.vbrick.com](http://www.vbrick.com)

Video on Demand Server (VBVoD)

The Video on Demand Server (VBVoD), designed for a range of applications including distance learning, corporate training and news distribution, streams high-quality video to the desktop, TV monitors, projectors and other standard video display devices.

Verint Systems

Woodbury, NY

[www.verintsystems.com](http://www.verintsystems.com)

ULTRA IntelliMiner

ULTRA IntelliMiner is an advanced Web-based analytical solution that extracts critical trends from contact center data and delivers this information as actionable intelligence directly to decision makers' desktops.

Vision-X

Los Angeles, CA

[www.vxiusa.com](http://www.vxiusa.com)

Vision Log

VisionLog is a digital recording system that captures, stores, archives and plays back telephony and computer activities.

VorTecs, Inc.

Shelton, CT

[www.vortecs.com](http://www.vortecs.com)

Spot It!

Spot It! is an application that uses speech recognition software and key word spotting to listen to conversations in real time. It can detect trigger words and phrases chosen by the administrator, identify agents talking over customers, detect volume changes and enable real-time monitoring with alerts for supervisor intervention if required.

WebEx Communications

San Jose, CA

[www.webex.com](http://www.webex.com)

WebEx Support Center

With WebEx Support Center's interface, support agents can view, diagnose and solve problems by sharing their applications and desktop to demonstrate products and features, or by accessing customer-selected applications or desktops.

WhisperWire

Austin, TX

[www.whisperwire.com](http://www.whisperwire.com)

PowerSeller

PowerSeller is an interactive selling system built on a communications-focused knowledge base that helps enable salespeople to sell high-value products and services.

Witness Systems

Roswell, GA

[www.witness.com](http://www.witness.com)

eQuality software suite

eQuality is an integrated contact center performance optimization software suite designed to help global enterprises capture customer intelligence and optimize workforce performance.

**Descriptors:** Hardware buyers' guide; Call center software; Contact manager; Customer relationship management software; Workgroup software; Sales force automation software; Sales/marketing software; Sales management software

**Product/Industry Names:** 7372630 (Workgroup Software)

**SIC Codes:** 7372 Prepackaged software

**NAICS Codes:** 51121 Software Publishers

**File Segment:** TI File 148

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**15/9/5 (Item 5 from file: 148)**

**15538046 ? ? Supplier Number: 97483132 (THIS IS THE FULL TEXT )**

**Customer Inter@ction Solutions' 2002 Product of the Year Awards. (Call Center/CRM Management Scope).**

**Customer Interaction Solutions , 21 , 7 , 44(4)**

**Jan , 2003**

**ISSN: 1533-3078**

**Language: English**

**Record Type: Fulltext**

**Word Count: 3760 ? ?Line Count: 00364**

**Text:**

Each year, Customer Inter@ction Solutions(R) magazine bestows its Product of the Year awards on companies that have demonstrated excellence in technological advancement and application refinements. These are products and services that have gone the extra mile to help improve both the customer experience and the ROI for the companies that use them.

In this time of shrinking budgets, every dollar spent on technology is precious, so it is viral that capital investment in technology and services be invested as wisely as possible in order to speed return on investment and improve the business processes and bottom line of the companies that purchase these technologies.

To this end, the editors of Customer Inter@ction Solutions(R) have compiled a list of the best of the best for our readers. These products span a range of product categories, but all represent the top of the heap in their chosen arenas. As always, we encourage you to do research to help you select those technologies and companies that best suit your company's business needs and, ultimately, your most important company asset of all -- your customers.

ACCPAC International, Inc.

Pleasanton, CA

[www.accpac.com](http://www.accpac.com)

ACCPAC eCRM

ACCPAC eCRM is an integrated sales, marketing, customer support and call center automation solution. It is completely Internet- and WAP-enabled, helping provide users access anytime, anywhere via a Web browser.

Axiom Corporation

Little Rock, AR

[www.acxiom.com](http://www.acxiom.com)

Personicsx

Personicsx is a household-level segmentation system that places each U.S. household into one of 70 life stage segments, based on its specific consumer and demographic characteristics, allowing a greater precision of targeted marketing and true accuracy of segmentation.

Advanced Information Systems, Inc

Las Vegas, NV  
[www.aisinfo.com](http://www.aisinfo.com)

iBizFlow

iBizFlow is an open, XML-based business rule engine providing scalable, redundant business solutions. Using iBizFlow, businesses are better able to create a single set of business rules that are applied to processes regardless of processing media.

Applied Innovation Management

Las Vegas, NV  
[www.lizsystems.com](http://www.lizsystems.com)

LIZ

LIZ combines state-of-the-art computer-telephony integration hardware with powerful help desk software in one compact unit, bringing 24-hour voice automation capabilities to the call center.

Apropos Technology

Oakbrook Terrace, IL  
[www.apropos.com](http://www.apropos.com)

Apropos Version 5

Apropos helps empower organizations by providing real-time knowledge about each customer interaction. Whether it's a phone call, email, Web or fax interaction, Apropos provides information about who initiates contact and why, plus the current status, resolution and pending tasks.

Aspect Communications

San Jose, CA  
[www.aspect.com](http://www.aspect.com)

Aspect eWorkforce Management

Aspect eWorkforce Management (eWFM) v6.2 provides an enhanced mission-critical architecture and new functionality required for staffing today's cost-conscious contact centers.

Austin Logistics Inc.

Austin, TX  
[www.austinlogistics.com](http://www.austinlogistics.com)

CallSelect

CallSelect software from Austin Logistics quantifies the impact of collection calls and other actions to help maximize dollars collected and agent productivity.

Authoria, Inc.

Waltham, MA  
[www.authoria.com](http://www.authoria.com)

Authoria HR 3.5

Authoria HR 3.5 is the next generation of Authoria's flagship software that delivers intelligent, personalized Web-based answers to employee benefit and HR policy questions.

Avaya

Basking Ridge, NJ  
[www.avaya.com](http://www.avaya.com)

Avaya Interaction Center

Avaya Interaction Center 6.0 is the core product of Avaya's Multimedia Contact Center solution, allowing consistent service across multiple channels and multi-vendor environments.

Avolent

San Francisco, CA  
[www.avolent.com](http://www.avolent.com)

BizCast 5.0

BizCast 5 offers technology to streamline the entire invoice-to-pay process. BizCast 5 is an EIPP enterprise software solution for companies

wanting to add invoice-to-pay automation to existing Internet-based e-commerce applications.

BEST Software's ACT!

Scottsdale, AZ

[www.act.com](http://www.act.com)

ACT! 6.0

ACT! is a contact management database product.

Blue Pumpkin

Sunnyvale, CA

[www.bluepumpkin.com](http://www.bluepumpkin.com)

Blue Pumpkin Workforce

Optimization Suite

Blue Pumpkin's Workforce Optimization Suite is a closed-loop system to accelerate employee and organizational performance. It was designed to perfect "the science behind the art of managing people."

Brooktrout Technology

Needham, MA

[www.brooktrout.com](http://www.brooktrout.com)

RealBLOCS DR-A

Brooktrout Technology's RealBLOCS DR-A is a call recording platform that emphasizes recording accuracy and clarity for building scaleable, open system, call logging and quality monitoring applications.

Call Compliance, Inc.

Glen Cove, NY

[www.callcompliance.com](http://www.callcompliance.com)

TeleBlock Do-Not-Call Blocking System

Call Compliance's patented TeleBlock system is the first and only blocking product that automatically screens and blocks outbound calls against state, in-house and third-party do-not-call and do-not-fax lists.

CenterForce Technologies, Inc.

Bethesda, MD

[www.cforcetech.com](http://www.cforcetech.com)

CenterForce Analyzer

CenterForce Analyzer measures agent, team and contact center performance against user-defined goals, providing immediate browser and e-mail based access to accurate, well-organized performance results.

Clear Technologies

Coppell, TX

[www.clearc2.com](http://www.clearc2.com)

C2 CRM

C2 CRM helps mid-market companies increase organizational efficiency, strengthen customer loyalty, boost sales, improve business processes and increase marketing effectiveness, and is Web-based for maximum accessibility.

Concerto Software

Westford, MA

[www.concerto.com](http://www.concerto.com)

ContactPro 4.2

Concerto's ContactPro 4.2 leverages real-time knowledge about customer relationships in delivering a personalized, consistent experience across all communication channels -- voice, fax, e-mail and the Web.

CosmoCom

Melville, NY

[www.cosmocom.com](http://www.cosmocom.com)

CosmoCall Universe

CosmoCall Universe (CCU), is a carrier-class system providing next-generation capabilities for mission-critical contact center applications. CCU supports multichannel customer interactions via telephone and Internet.

Data-Tel Info Solutions

Mesa, AZ

[www.datatelsolutions.com](http://www.datatelsolutions.com)

xSELLerator 6.0

Data-Tel's xSELLerator 6.0 is a contact center suite for inbound, outbound and Web-bound call blending.

Digisoft Computers, Inc.

New York, NY

[www.digisoft.com](http://www.digisoft.com)

Telescript 5.4

Telescript 5.4 is a modular and scalable call center management solution designed to integrate with telephone, database and other call center-related systems.

Discern Communications

Menlo Park, CA

[www.discern.com](http://www.discern.com)

Discern

Discern is a customer self-service application that interprets customers' Web-based or spoken queries and provides them direct answers from multiple information sources. Language-understanding capabilities automate question answering at the entry point of customer service.

divine, Inc.

Chicago, IL

[www.divine.com](http://www.divine.com)

divine MindAlign 2002

divine MindAlign is a secure, real-time collaboration tool that combines chat and instant messaging to provide a community-based communication medium.

eAssist Global Solutions, Inc.

San Diego, CA

[www.eassist.com](http://www.eassist.com)

eAssist Solution Suite 2.1

The eAssist Solution Suite is a fully integrated suite of customer care software and services; it enables companies to gain a unified view of their customers across geographies, products and points of interaction.

Edify Corp.

Santa Clara, CA

[www.edify.com](http://www.edify.com)

Edify 8

Edify 8.0 is a comprehensive multi-channel platform including CRM applications and infrastructure components that automate, assist and analyze customer interaction across all touchpoints and for all modes of communication including voice, wireless and Web.

eGain

Sunnyvale, CA

[www.egain.com](http://www.egain.com)

eGain Live Web 5.0 suite

eGain Live Web 5.0 is a suite for real-time assisted customer service over the Web. It provides applications for chat, co-browsing, remote diagnostics and repair, and online meetings.

Empirix

Waltham, MA

[www.empirix.com](http://www.empirix.com)

Hammer On-Call

Hammer On-Call testing services help contact centers find and resolve scalability problems before they adversely affect operational performance and customer satisfaction.

enGenic Corp.

Vancouver, BC

[www.engenic.com](http://www.engenic.com)

TaleFlow 2003

TaleFlow 2003 is a voice application development suite designed to remove the complexity of building voice solutions -- such as call management, interactive voice response (IVR), voice mail, call centers, computer-telephony integration (CTI) and voice portals -- by encapsulating

complex functions into simple-to-understand icons.

Envision Telephony, Inc.

Seattle, WA

[www.envisiontelephony.com](http://www.envisiontelephony.com)

Click2Coach MultiSite Edition

Click2Coach is a software solution designed to provide integrated qualify monitoring, training and motivation tools to help develop effective, well-trained agents.

eOn Communications

Kennesaw, GA

[www.eoncommunications.com](http://www.eoncommunications.com)

eQueue Multi-Media Contact Center Solution

eOn's eQueue Multi-Media Contact Center Solution offers a comprehensive and unified solution for customer interaction management (CIM). The universal or single queue approach enables contact centers to efficiently interact with their customers, regardless of the media they choose for communication.

ePeople

Mountain View, CA

[www.epeople.com](http://www.epeople.com)

ePeople Teamwork

ePeople Teamwork 4.0 is a Web-based, collaborative customer support application that enables cross-functional teams to better service customers. There are four modules that make up the ePeople Teamwork application: Team Sourcing, Team Workspace, Team Analytics and Team Resolution Engine.

Epicor Software Corp.

Irvine, CA

[www.clientele.epicor.com](http://www.clientele.epicor.com)

Clientele Customer Support 8.0

Clientele Customer Support 8.0 is a complete call management solution for supporting external customers, and is built entirely on the Microsoft .NET platform.

EPOS Corp.

Auburn, AL

[www.epos.com](http://www.epos.com)

Call Center Director

Call Center Director is designed for small to medium-sized call centers that wish to improve customer satisfaction and agent efficiency through the use of screen pops and case management integration.

e-talk Corp.

Irving, TX

[www.etalk.com](http://www.etalk.com)

Qfiniti

The e-talk Qfiniti platform empowers customer contact centers with a comprehensive and integrated qualify management solution for the enterprise.

Expertcity, Inc.

Santa Barbara, CA

[www.desktopstreaming.com](http://www.desktopstreaming.com)

Desktop Streaming Phone Mode DesktopStreaming is a Web-based service that allows businesses to remotely assist their customers or employees and conduct online sales demos, It enables shared screen, mouse and keyboard control without installing software on the users computers.

Firepond, Inc.

Minneapolis, MN

[www.firepond.com](http://www.firepond.com)

Firepond eServicePerformer Suite 2002

Firepond's eServicePerformer 2002 system delivers online customer service in a way that deflects customers from costly assistance channels, It provides immediate, accurate and qualified responses, regardless of contact channel.

Firstwave Technologies

Atlanta, GA

[www.firstwave.net](http://www.firstwave.net)

Firstwave eCRM

Firstwave eCRM is a 100 percent Web-based CRM application designed to make marketing, sales and service organizations more efficient by streamlining processes and building solid relationships with customers and prospects.

FurstPerson

Chicago, IL

[www.furstperson.com](http://www.furstperson.com)

FurstSelect Hiring System

The Web-based FurstSelect Hiring System is an integrated, end-to-end staffing solution designed exclusively for the call center environment.

Fused Solutions

Potsdam, NY

[www.fusedsolutions.com](http://www.fusedsolutions.com)

FS-Virtual Agent

FS-Virtual Agent is a Web-driven, self-service contact-center application designed to provide level one and level two technical support by front-ending a custom-built knowledge base used by Fused Solutions' live agents.

Genesys Telecommunications Labs, Inc.

Daly City, CA

[www.genesyslab.com](http://www.genesyslab.com)

Genesys Voice Portal

Genesys Voice Portal is an advanced software-only product designed to bring Internet technologies to the world of voice, helping deliver voice self-service applications. It removes the constraints of legacy IVR systems and offers standards-based development, flexible deployment options, simplified integration and improved time to market for speech-directed voice applications.

GMT Corp

Norcross, GA

[www.gmt.com](http://www.gmt.com)

GMT Planet -- Jupiter Edition 8.02

GMT Planet -- Jupiter Edition is a workforce management software for call centers, multimedia contact centers, financial institutions, processing centers, service industries and the entire enterprise. Includes real-time adherence, compliance reporting and a meeting planner.

GN Netcom, Inc.

Nashua, NH

[www.gnnetcom.com](http://www.gnnetcom.com)

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KANA  
Menlo Park, CA  
[www.kana.com](http://www.kana.com)

KANA Response 7.5

KANA Response software version 7.5 helps enable global enterprises to provide immediate and effective response to customer inquiries in most major languages. One of the modular solutions that make up the KANA CARE suite of products, KANA Response 7.5 is the latest in a series of product releases dedicated to providing features and functionality that meet the needs of global enterprises.

KnowledgeBase Solutions, Inc.  
Los Angeles, CA  
[www.knowledgebase.net](http://www.knowledgebase.net)

KnowledgeBase.net

KnowledgeBase.net combines the most relevant features of document and knowledge management, customized portals and search technology to deliver a comprehensive support self-service knowledge base.

Linktivity, a division of SpartaCom Technologies  
Tucson, AZ  
[www.linktivity.com](http://www.linktivity.com)

WebDemo

WebDemo is a Web-based, real-time collaboration tool designed to provide a simple way for presenters to deliver online presentations from their desktops and to interact with an audience of remote participants, all of whom require nothing more than a PC and an Internet connection.

LumenVox  
San Diego, CA  
[www.lumenvox.com](http://www.lumenvox.com)

Speech Driven Information System Speech Driven Information System (SDIS) is an easy-to-use GUI wrapped around LumenVox's Speech Recognition Engine (SRE). It was designed to allow companies to develop their own speech recognition application in three easy steps.

Mitel Networks  
Ottawa, ON  
[www.mitel.com](http://www.mitel.com)

Mitel Networks 6150 Multimedia Contact Center

The 6150 is a modular offering that integrates with Microsoft Exchange 2000 and Outlook 2000 to support automatic e-mail routing, historical reporting and real-time monitoring of all contact types.

MoonFire Corp.  
Mead, CO  
[www.dialvision.com](http://www.dialvision.com)

DialVision

DialVision is a 100 percent Web-based CIM/telemarketing software application designed to be accessed through the Internet Explorer Web

browser.

Motive Communications

Austin, TX

[www.motive.com](http://www.motive.com)

Motive Enterprise Software Service Suite

Motive's Enterprise suite enables vendors to build intelligent service directly into their software applications. Designed to deliver proactive, targeted assistance throughout the customer lifecycle, these solutions were designed to enable software vendors to increase revenue.

Multima Corp.

East Greenwich, RI

[www.netkeeper.com](http://www.netkeeper.com)

Net Keeper HD Mail Pro v7.5

Net Keeper HD Mail is an automatic incoming e-mail processing system designed to cut the cost of running a customer service center.

NativeMinds, Inc.

San Francisco, CA

[www.nativeminds.com](http://www.nativeminds.com)

NeuroServer 3.5

Unlike traditional natural language search engines that scan Web sites and return long lists of results, NeuroServer 3.0 enables virtual service agents to gauge customers' questions based on question type, tone and customer history, and answer precisely with accurate, personalized replies.

NetByTel

Boca Raton, FL

[www.netbytel.com](http://www.netbytel.com)

OpenVoice Application Platform NetByTel's OpenVoice Application Platform includes application and functional components and is used exclusively by NetByTel to design, build, deploy, enhance and manage sophisticated, high-quality phone self-service solutions.

NICE Systems

Rutherford, NJ

[www.nice.com](http://www.nice.com)

Business Analyzer

NICE's Business Analyzer capabilities combine state-of-the-art technologies including automatic speech recognition (ASR), word spotting and stress/emotion analysis to enable businesses to extract the spoken and unspoken content from interactions.

Nortel Networks

Richardson, TX

[www.nortelnetworks.com](http://www.nortelnetworks.com)

Symposium Call Center Web Client Nortel Networks Symposium Call Center Web Client is a new, browser-based thin client introducing management tools which better equip call center managers to make improved business decisions and respond faster to customer needs.

Nuance Communications

Menlo Park, CA

[www.nuance.com](http://www.nuance.com)

Nuance 8.0

Nuance 8.0 is an accurate, scalable and reliable speech recognition software product.

Oncontact Software

Cedarburg, WI

[www.oncontact.com](http://www.oncontact.com)

Client Management Software - Version 6.0

Client Management Software (CMS) is Oncontact Software's CRM system for mid-market companies. OMS houses the critical business information an organization needs to develop effective sales, marketing and customer service strategies.

Oracle Corp.

Redwood Shores, CA

www.oracle.com  
Oracle Service Contracts  
Oracle Service Contracts enables users to create and manage service contracts, warranties and extended warranties. It makes contract entitlements visible, and it acts on contractually specified commitments.

Pivotal Corp.  
North Vancouver, BC  
www.pivotal.com

Pivotal Contact Center

By leveraging client data across the organization, Pivotal Contact Center was designed to transform tactical call centers into strategic contact centers, delivering more personalized, "one and done" interactions at lower costs, resulting in increased revenues, margins and customer loyalty.

Princeton Softech  
Princeton, NJ  
www.princetonsofttech.com

Princeton Softech's Archive for Servers

Princeton Softech's Archive for Servers supports the leading database management systems, including Oracle, DB2/UDB, SQL Server, Sybase and Informix and provides the capabilities needed to implement an effective active archiving strategy.

Pronexus Inc.  
Ottawa, ON  
www.pronexus.com

VBVoice 5.0

VBVoice 5.0 is a telephony development environment to leverage the power of Microsoft Visual Studio. Net. It features support for voice over IP (VoIP), comprehensive telephony controls such as speech recognition and text-to-speech and a highly scalable architecture.

Prosodie Interactive  
Fort Lauderdale, FL  
www.prosodieinteractive.com

FasTrack

Prosodie Interactive's FasTrack is a "find-me, follow-me, connect-me" communications service. Using proprietary technologies, FasTrack unifies all telecommunications -- work, home, cellular, pager, voice mail and fax -- into one number.

RightNow Technologies, Inc.  
Bozeman, MT  
www.rightrightnow.com

RightNow Locator 2.0

RightNow Locator 2.0 is an advanced solution for providing customers with information about sales and service locations over the Web.

Rockwell FirstPoint Contact  
Wood Dale, IL  
www.rockwellfirstpoint.com

FirstPoint Business Edition

FirstPoint Business Edition lowers the cost of entry for small to medium-size businesses by up to 30 percent by providing an "out-of-the-box," multichannel contact center solution, with all of the flexibility, functionality and integration offered to large companies.

salesforce.com  
San Francisco, CA  
www.salesforce.com  
salesforce.com  
Enterprise Edition  
salesforce.com

Enterprise Edition allows companies to simplify and standardize complex customer operations through a single online solution that can be deployed across multiple departments and divisions -- without requiring the

purchase or installation of a single line of code.

SAP  
Newtown Square, PA  
[www.sap.com](http://www.sap.com)  
mySAP CRM

With mySAP CRM, SAP delivers an integrated CRM solution designed to align and connect employees, partners, business processes, information and technology within a closed-loop customer-interaction cycle.

SAS Institute, Inc.  
Cary, NC  
[www.sas.com](http://www.sas.com)

SAS Marketing Automation Release 2.2

SAS Marketing Automation combines data warehousing, advanced analytics and campaign planning/ management methodologies to synthesize customer data across all lines of business.

Siemens Information and Communication Networks  
Reston, VA  
[www.siemensenterprise.com](http://www.siemensenterprise.com)

HiPath ProCenter Suites

The newest release of Siemens HiPath ProCenter solution offers "real world" CRM features such as a new graphical user interface for business rules routing, Web collaboration and e-mail fully-integrated at the agent/supervisor desk.

Spanlink Communications  
Minneapolis, MN  
[www.spanlink.com](http://www.spanlink.com)

EagleView Reporting Engine

EagleView is a secure, scalable, Web-based reporting engine that allows contact centers to incorporate data from any compliant data source.

Spectel  
Andover, MA  
[www.spectel.com](http://www.spectel.com)

Spectel MeetingManager

Especially designed for small to medium-sized businesses, the Spectel MeetingManager platform provides anytime, anyplace voice conferencing for up to 60 concurrent participants.

Spectrum Corp.  
Houston, TX  
[www.speccorp.com](http://www.speccorp.com)

IP Wallboards

The 3004 series is a collection of two-line wallboards, with IP address-ability, for the call center industry.

Stratasoft, Inc.  
Houston, TX  
[www.stratasoft.com](http://www.stratasoft.com)

StrataDial VC2 -- Virtual Contact Center

StrataDial VC2 -- Virtual Contact

Center is a set of essential telephony applications, including outbound predictive dialing, inbound automatic call distributor, voice mail and an auto-attendant on an open standards-based, application-ready platform.

SupportSoft  
Redwood City, CA  
[www.supportsoft.com](http://www.supportsoft.com)

Resolution Suite

SupportSoft's Resolution Suite Web-based software was designed to help enterprises automate the support process for their employees by quickly identifying problems and automatically resolving them.

SYMON Communications, Inc.  
Sugar Land, TX  
[www.symon.com](http://www.symon.com)

Contact Center COMMUNITY 2.0

Contact Center COMMUNITY 2.0 is a 100 percent Web-based workforce management solution that provides timely contact center schedules and performance data to agents and supervisors in both local and remote settings.

TeleDirect International, Inc.

Scottsdale, AZ

[www.tdirect.com](http://www.tdirect.com)

DialogGuide

The Dialog Guide, a component of Dialog Manager, is divided into three different viewing panels for agents: Data Display Panel, Call Flow Topics Panel and Action/Statistics Panel. The layout was designed to improve navigation and reduces the agent's learning curve.

Telephony @ Work

La Jolla, CA

[www.telephonyatwork.com](http://www.telephonyatwork.com)

CallCenter @ nywhere Version 6.0 CallCenter @ nywhere is an integrated communications server platform that can integrate or replace legacy switching infrastructures. The platform provides infrastructure for, and applies skills-based routing discipline to, every medium of communication, including inbound phone calls, faxes, e-mail, voice mail, chat sessions, Web callback and voice over P transactions.

Teloquent Communications

Billerica, MA

[www.teloquent.com](http://www.teloquent.com)

Teloquent Interchange 6.0

A browser-based interaction platform, Interchange provides voice, email and Web-based contact, integrated with any customer relationship management (CRM) application.

Ulysses Learning

Mooresville, NC

[www.ulyseslearning.com](http://www.ulyseslearning.com)

CallMentor

CallMentor is a complete simulation-based e-learning system for service, sales and coaching.

VBrick Systems

Wallingford, CT

[www.vbrick.com](http://www.vbrick.com)

Video on Demand Server (VBVoD)

The Video on Demand Server (VBVoD), designed for a range of applications including distance learning, corporate training and news distribution, streams high-quality video to the desktop, TV monitors, projectors and other standard video display devices.

Verint Systems

Woodbury, NY

[www.verintsystems.com](http://www.verintsystems.com)

ULTRA IntelliMiner

ULTRA IntelliMiner is an advanced Web-based analytical solution that extracts critical trends from contact center data and delivers this information as actionable intelligence directly to decision makers' desktops.

Vision-X

Los Angeles, CA

[www.vxiusa.com](http://www.vxiusa.com)

Vision Log

VisionLog is a digital recording system that captures, stores, archives and plays back telephony and computer activities.

VorTecs, Inc.

Shelton, CT

[www.vortecs.com](http://www.vortecs.com)

Spot It!

Spot It! is an application that uses speech recognition software and key word spotting to listen

to conversations in real time. It can detect trigger words and phrases chosen by the administrator, identify agents talking over customers, detect volume changes and enable real-time monitoring with alerts for supervisor intervention if required.

WebEx Communications

San Jose, CA

[www.webex.com](http://www.webex.com)

WebEx Support Center

With WebEx Support Center's interface, support agents can view, diagnose and solve problems by sharing their applications and desktop to demonstrate products and features, or by accessing customer-selected applications or desktops.

WhisperWire

Austin, TX

[www.whisperwire.com](http://www.whisperwire.com)

PowerSeller

PowerSeller is an interactive selling system built on a communications-focused knowledge base that helps enable salespeople to sell high-value products and services.

Witness Systems

Roswell, GA

[www.witness.com](http://www.witness.com)

eQuality software suite

eQuality is an integrated contact center performance optimization software suite designed to help global enterprises capture customer intelligence and optimize workforce performance.

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**Industry Codes/Names: BUSN Any type of business; TELC Telecommunications**

**File Segment: TI File 148**

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**15/9/6 (Item 6 from file: 15)**

**02149234 ? ? ? ? ? 69176659**

**Winning customers' confidence**

**Hollman, Lee**

**Call Center Magazine ? v14n3 ?pp: 26-42**

**Mar 2001**

**ISSN: 1064-5543 ?Journal Code: CCMA**

**Document Type: Periodical; Feature ?Language: English ?Record Type: Fulltext ?Length: 9 Pages**

**Special Feature: Graph Illustration**

**Word Count: 5677**

### **Abstract:**

By using customer relationship management software, call center managers can help ensure that agents can view important information such as customer histories with your company. When agents can automatically find out everything they need to know about each customer, they do not have to fumble for answers. CRM software also helps your agents work together as a winning team. With more CRM vendors offering a growing number of products to choose from, a big challenge is selecting the right software for your call center. A look at some of the latest CRM software that can help your

company win customers' confidence is presented, including: Oracle's Interaction Center Suite, Avaya's CRM Central 2000 and Avaya CT for Seibel eBusiness Applications, Nortel Networks' eFront Office, Cincom's Encompass 3.4 and StayinFront's Call Center for VisualElk.

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**Text:**

Customer relationship management requires you to earn customers' trust and to strengthen their confidence in your company. Here's how the latest CRM software can help you to achieve these goals.

Consider the wisdom of legendary football coach Vince Lombardi, who said "Winning isn't everything - but wanting to win is." Vince never managed a call center, but if he did he'd understand the importance of trying your best to win your customers' confidence. Sure, he might have gathered agents into a huddle before they took calls or required them to do calisthenics during lunch breaks. But he wouldn't lose sight of his ultimate goal: complete customer satisfaction.

Fortunately for you, providing efficient service to your customers is considerably less arduous than scoring a crucial touchdown at the end of the fourth quarter. By using customer relationship management (CRM) software, you can help ensure that agents can view important information such as customer histories with your company. When agents can automatically find out everything they need to know about each customer, they don't have to fumble for answers.

CRM software also helps your agents work together as a winning team. Vince Lombardi made sure that everybody on his team knew the game plan so that they didn't just run across the field randomly in different directions. Yet many call center managers don't make certain that all agents receive the information they need to help each customer. For example, let's say a customer sends an e-mail message to your call center, which one agent reads. The same customer then calls a day later only to reach another agent who never saw the message. That customer might patiently explain the content of the e-mail, but will more likely become frustrated at having to take the extra time to do so.

Yet CRM software can't fully ensure that agents provide consistent service to customers. Doculabs, a Chicago, IL-based research firm that reviews software for online businesses, recently completed a benchmark study on CRM software from seven leading vendors, including Avaya, Nortel Networks and Siebel Systems. Most of the software didn't enable agents to offer a consistent reply to customers' requests. Bill Chambers, group director of research for Doculabs, speculates why. "The continued focus of CRM vendors on customer service transactions, like capturing support inquiries, hinders their ability to develop a consistent response across various channels," he says.

Steve Pratt, the global leader of Deloitte Consulting's CRM practice, agrees that the greatest challenge CRM vendors face is providing the same information about each customer to everyone who uses the software. He explains that although vendors can easily create a unified standard for helping customers, that isn't a practical solution for most businesses. "Implementing a common set of customer interaction practices is not a smart thing to do, nor is it achievable," he says, and he provides an example to illustrate his point.

"You take a large, diversified financial institution," says Pratt. "You have private banking, retail banking and commercial banking [divisions],

all of them very distinct business units. As recently as a year ago, CRM vendors were encouraging one application with one set of screens and one set of business rules to apply to all of those businesses. The people running the businesses said, 'We're not going to do it.'" Pratt says that some CRM vendors solved the problem by enabling their customers to configure the software differently for each group of agents. As a result, private banking and retail banking agents, for example, can view the same customer data from screens tailored to help them offer different services to different types of customers.

Agents can also use the information CRM software provides not only to address customers' concerns, but to also find new sales opportunities. If, for example, an agent notices that a given customer previously called about purchasing a television set, the agent could mention a special promotion that your company offers on a new model. This is just one of the ways you can use CRM software to generate revenue in addition to providing customer support.

A recent study conducted by the Aberdeen Group, a research and consulting firm based in Boston, MA, found that CRM software for making sales represents the fastest-growing segment of the CRM marketplace. Sales-related products earned CRM vendors \$2 billion in revenue in 1999, and they can expect to earn an estimated total of \$6 billion by 2003. In the same study, the Aberdeen Group revealed that the customer support segment of the CRM software industry earned \$945 million in revenue in 1999 and will earn a projected sum of \$3 billion in 2003.

With more CRM vendors offering a growing number of products to choose from, a big challenge is selecting the right software for your call center. Here's a look at some of the latest CRM software that can help your company win customers' confidence.

#### Multimedia Mania Grips

#### Leading CRM Software Vendors

As leading CRM software vendors create products to help agents handle on-line customers, the boundaries between CRM and eCRM software gradually fade away.

Oracle (Redwood Shores, CA) offers Oracle Interaction Center Suite, a series of CRM modules that you can purchase with or separately from E-Business Suite. EBusiness Suite lets employees working in other departments in your company find the information they need.

Oracle Interaction Center Suite includes modules that enable agents to view call scripts, receive phone calls and e-mail messages. You can use any and all modules from Oracle Interaction Center with modules from E-Business Suite so that agents and employees from other departments in your company, like marketing, human resources and accounting, can view the same information about each customer.

Lisa Arthur, the vice president of CRM product marketing for Oracle, provides an example to describe how agents can use Oracle Interaction Center to find customer data from different branches of your company. "A call center agent can view a customer's invoice history from accounts receivable through a screen pop," she says. "So if a customer has a question about a specific bill, agents can answer it right there without transferring the customer to accounting."

Arthur adds that many companies use separate CRM software for handling different types of messages, like phone calls and e-mails. She says that this approach can be costly and time-consuming compared to using one

software suite for every type of message across your entire company, and she draws an analogy to prove her point.

"Let's say that I buy a BMW and get great performance and maintenance," says Arthur. "Or I could go out and buy the engine from BMW, the chassis from another company, the tires somewhere else and have somebody put it all together for me. That's what a lot of call centers are trying to do to build a 'best of breed' CRM software package. The complexity, cost and time involved is daunting compared to purchasing one option that gives you everything you need."

But Arthur also concedes that it can be difficult for call centers to make the transition to helping on-line customers, regardless of what CRM software they use. "The call center has an impact on the company's IT and telecommunications structure, [in addition to] the marketing, sales, service and collections departments," she says. "There are a lot of stakeholders involved in the ultimate decision." Nevertheless, Arthur estimates that when Oracle first offered the module of Oracle Interaction Center that allows agents to handle e-mail messages, 35% of Oracle's customers with call centers purchased it within the first few months of its release.

So what do call center managers want from CRM software? Arthur is quick with an answer. "I'll give you three words," she says. "One is completeness. Agents and call center managers want to look across the company at a customer from all channels. Two is simplicity, and three is consistency. All organizations want to provide intelligent and consistent data to their customers."

CRM Central 2000 from Avaya (Basking Ridge, NJ) can also help you provide consistent data to agents. The software lets you send screen pops with incoming phone calls, and these screen pops can contain diverse information from different sources like billing records and customer profiles. CRM Central 2000 also lets agents respond to e-mail messages, browse Web pages with customers and participate in text chat and voice-over-IP conversations with them.

The Aberdeen Group projects a rapid rise in revenue for CRM vendors that offer products to help agents make sales and provide customer support, in addition to slow and steady growth for CRM software that focuses on help desk, marketing and field support services.

Ynette Gibbs, director of marketing for CRM solutions at Avaya, estimates that more than 300 of the company's call center clients use Avaya's CRM software to help customers who contact agents through methods like e-mail or text chat. She advises that call center managers who want to find the right CRM software for their Web-enabled centers should have some understanding of what their service goals are while also remaining flexible and willing to change.

"Any time you're going into new territory, your expectations as an organization need to be set clearly," says Gibbs. "The organizations that we've worked with that have considered what type of CRM strategy they want to use, or are willing to learn as they grow, have been extraordinarily successful over time." Gibbs also cautions that using CRM software isn't a cure-all for your customer service and support needs. "It's not a big bang effect, but more of an evolutionary process," she says.

Gibbs recalls how Avaya helped Nexstar Financial Corporation, a mortgage firm based in St. Louis, MO, decide on its own CRM strategy. "It went through a 90-day implementation period and changed its approach to providing customer support four times," she says. Nexstar's management accepted staff suggestions about how to handle specific transactions, like

processing mortgage loan applications on-line. Since filling out one of these applications can be a complex process, Nexstar modified the on-line form to include an icon that customers can click on to request text chat assistance from a live agent.

You can also use Avaya's Individual Service Management (ISM) software with CRM Central 2000 to route customers' phone calls based on their past experiences with your call center. For example, if an important customer calls after having remained on hold for a long time during a previous call, agents view a screen pop recommending that they not put that customer on hold again. With Individual Service Management, you can also prioritize calls from preferred customers so that agents help them first.

Avaya also released Ayava CT for Siebel eBusiness Applications after partnering with Siebel (San Mateo, CA) in June. The software enables CentreVu Internet Solutions, Avaya's CRM software designed for Internet-based transactions, to work with Siebel's eBusiness Applications software suite. "We're leveraging each other's strengths," says Gibbs. "Siebel is handling how to save customer data, and we're handling how to provide customer data to agents in the most efficient way."

Matt Malden, the senior director of call center field service and Web service for Siebel, concurs with Gibbs that Siebel and Avaya fit together perfectly. "We took a look at our technologies and they're completely complementary," says Malden. "Without Siebel, Avaya lets agents view screen pops, but with what content? Siebel has all the customer data, like who they are and what actions they take. Agents can also view a history of prior customer service issues and outstanding sales opportunities in addition to product information and literature."

Siebel eBusiness Applications includes Siebel Call Center, which you can purchase as a standalone product. Siebel Call Center enables agents to respond to phone calls, e-mail messages, text chat and voiceover-IP calls. Agents can select each type of message from multiple queues on the same screen and can view scripted information for every message they receive, regardless of what media is used.

Siebel also partnered with Quintus (Fremont, CA) in May. Malden says that Siebel eBusiness Applications 2001, the forthcoming upgrade to the company's software suite, will include a universal queuing feature from Quintus. "Our relationship with Avaya entails our marketing joint solutions for customers on the Avaya platform," he says. "With Quintus, we're marketing a flexible alternative that supports a wide variety of phone switches."

Lawrence Byrd, the chief strategy officer for Quintus, says that the company resells Siebel's eBusiness Applications with Quintus' eContact Suite. He explains what led to Quintus' partnership with Siebel. "We've done a lot of work to make our eContact framework application neutral, to allow our customers to send screen pops regardless of the software that agents use to perform transactions with customers," he says. "But since many of our customers who use CRM software selected Siebel, we also selected to work with them."

Byrd explains that Quintus decided on its "application-neutral" approach to appeal to companies that are just now upgrading their call centers. "Today's CRM market is about the traditional brick-and-mortar company becoming a click-and-mortar company," he says. "And they typically say, 'I've already got phone switches and software. Show me how this new stuff fits in with that, and don't tell me I have to throw it all away.' It shouldn't be the case that [working with] the Web involves throwing away your last decade's worth of call center investments."

Quintus' eContact Suite includes the QRouter module so that you can set rules for routing phone calls, voice-over-IP calls, Web callbacks, and e-mail and text chat messages to agents with specific skills. For example, you might enable only the most computer-literate agents to handle voice-over-IP calls since the majority of your technically-- savvy customers are more likely to use that option. Agents use the QConsole module to view call scripts, Web pages and customer data from the QRepository knowledge base.

Byrd says that most of the difficulties call centers face when they first provide on-line customer service tend to be organizational instead of technical. "In many cases, e-mail is probably being sorted out by the marketing department, and the e-commerce czar is probably in the basement and hasn't yet gotten around to talking to the customer service agents," he says. "I joke at conferences that the first time your call center finds out that your company has an ecommerce site is when customers call to complain about something."

Eric Carrasquilla, the business line manager for Nortel Networks (Richardson, TX), agrees with Byrd that providing agents with consistent information about each customer isn't always an easy goal for call center managers to achieve. "The real challenge with call center agents is making sure they have the right information about the person on the other end of the phone," he says. "The way around that challenge is to go with a CRM solution that's an integrated suite with one customer database. It's a lot easier to keep tabs on the customer information that you have rather than working with seven or eight systems and reconciling the differences between each one."

Carrasquilla points out that although there are some differences in how call centers work with Nortel's eFront Office CRM suite, the managers of every center appreciate using an integrated CRM software suite to send customer information and other data to agents. "Depending on the customer, the vertical industry they're a part of, and the size of the call center, there are different little features that [companies] want for their CRM software," he says. "But the bottom line is, outside of making sure they can retain customers, they need to make sure these pieces play nice together so that agents are all clued in to what's going on with each customer."

After acquiring Clarify in March 2000, Nortel Networks began offering Clarify's eFront Office. The software includes the ClearCall Center module, which lets agents view customer information and data from other modules of the suite from the same console. For example, agents can view pricing for specific products from the ClearSales module, and a record of customers' service requests from the ClearSupport module.

Nortel Networks also acquired Periphonics, a company that offers IVR and speech recognition software, in August 1999.

Carrasquilla explains that eFront Office can work with Periphonics' software to expand the types of communication that agents and customers can use. "We really saw Nortel branching out from strictly a telephony heritage into the next direction that the [CRM] market is moving," he says. "Any call center worth its salt today and in the next few years isn't going to be about just telephony," he says. "It's about [providing] a seamless customer experience, whether customers use the phone, the Web or talk to someone face-to-face."

#### Other CRM Software Vendors

#### Tackle The Internet

Many other CRM software vendors also upgraded their products to accommodate on-line customers. Cincom Encompass 3.4, from Cincom (Cincinnati, OH), for example, enables agents to respond to phone calls and e-mail messages from one queue with its Unified Messaging module. Unified Messaging displays information to agents that can include call scripts for sales campaigns and Microsoft Word documents in addition to screen pops with customers' profiles.

Nortel Networks' eFront Office software suite features the ClearSupport module that enables agents to view a history of support requests from each customer.

Cincom also offers Encompass Web, an optional module for Encompass that lets customers send e-mail messages, request Web callbacks, and participate in text chat and voice-over-IP conversations with agents. Encompass Web also provides agents with customer information and histories. "Right now about 10% of our customers use it," says Theresa Van Laeken, director of product management for Cincom. "But many of them are interested in Encompass Web and will implement the module within six to nine months."

Van Laeken explains why she believes many call centers don't yet use CRM software to help on-line customers. "I think it's the challenge of identifying agents' skills, segregating your agent pool and defining who is appropriate to handle which type of contact," she says. "Call center managers must then come up with the business rules regarding the routing of those contacts." For example, you would probably want to find out which agents have the best typing skills before you let them handle text chat sessions.

Regarding the future of CRM software, Van Laeken observes two major trends. "The first trend is toward multimedia contact channel support," she says. "Companies are scrambling to support mediums like Web and e-mail. The second trend that's equally important is the ability to [provide] the necessary data that agents need to determine how valuable each customer is." Van Laeken says that Encompass enables agents to view data about customers, such as buying habits and their history with your company. The data helps agents to market specific merchandise to the customers who are most likely to want it.

Sam Barclay, vice president of business development for StayinFront (formerly Great Elk; Fairfield, NJ), also agrees that as more companies Web-enable their call centers, the distinction between CRM and eCRM software will vanish. "We don't see people attempting to handle customers through the phone and on the Internet separately," says Barclay. "Customer interaction is customer interaction."

StayinFront's Call Center for VisualElk enables agents to view a history of each customer's correspondence with your company through a Web browser or from the software's own agent screen. Barclay says that almost all of StayinFront's customers prefer using the software alone instead of with Web browsers, since agents can more readily view data from your phone switch, like average call length and handle times, using the software alone. To view the same data from a browser, some Dynamic HTML programming is required.

Barclay explains that most of his customers who manage call centers help on-line customers, and he reports a rise in demand among the company's customers who need to integrate VisualElk with enterprise resource planning software. "The most common request is that [agents] can see the history of customers' purchases in addition to interactions," he says. "And those pieces of data may be stored on a back-end system." Although Barclay says that Visual Elk can work with systems from vendors like SAP and Oracle,

StayinFront can customize the software to work with databases and software from other companies.

Swallow Information Systems' (Beverly, MA) Charter Continuum CRM software suite provides agents with a view of customer histories that can include notes about their previous phone calls, a complete record of their e-mail correspondence and the data that they enter into on-line forms from your company's Web site. Agents can view and update these records from a Web browser and forward them to other agents.

Bill Bostridge, vice president of sales for Swallow Information Systems, is confident that as more businesses offer Internet service, more CRM software will enable agents to manage customer relationships on-line. "Call centers have realized that a different set of skills is required to handle inbound e-mail and Web contacts," says Bostridge, "and therefore have had to come to terms with managing an entirely new medium of contact." 11 Bostridge explains that many call centers have a difficult time upgrading the CRM software that they currently use. "The biggest challenge for our customers is integrating their traditional CRM software and legacy back-end systems with new e-mail management software," he says. "You need to ensure that you are providing call center agents with one unified view of each customer's entire transaction history." Bostridge also predicts that more CRM software vendors will upgrade their products to handle on-line transactions to appeal to call center managers.

Agents and other employees at your company receive an equally detailed view of customer data with Loyalty Suite 5.0, from eLoyalty (Lake Forest, IL). The upgrade to the company's suite includes the new Loyalty Outcome Manager module, which lets you generate reports based on customer data and view the reports through a Web browser. This helps you discover, for example, who your most profitable customers are and what merchandise they purchased.

#### Selecting Your

##### CRM Software Strategy

CRM software can help agents make sales, market your company's products and services, and provide customer support. But some CRM vendors speculate that most call centers use their products primarily for sales and marketing. Steve Morse, director of product management for Exchange Applications (Boston, MA), explains why.

"One of the reasons, from a marketing and sales perspective, [is that] it's pretty easy to track your success," says Morse. "We say to our customers, 'We can quantifiably improve your operation.' Your marketing campaign is averaging a return on investment by 20% and we can bring that up to 30%. It's more difficult to quantify how efficiently your help desk operates."

Morse adds that since call centers for businesses prioritize profits, there will most likely always be a greater demand for CRM software that enables these centers to improve their sales and marketing services. "Help desk software focuses more on what you can do to solve customers' immediate problems," he says. "In some cases people are using the incorrect metrics to rate [help desk efficiency], like how long an agent is on a call. But if it's one of your best customers calling you, you shouldn't be as hard on agents about minimizing the time [they spend] talking to that customer. The most important thing is to improve the value customers have to your company.

You can purchase separate modules from Exchange Applications' Xchange 7 CRM software suite to help agents recognize and act on sales opportunities. Xchange Real Time collects data from legacy systems so that

agents can view histories of customers' interactions with your company. Based on this information, agents can then determine how customers responded to past marketing campaigns and can offer products and services that match their individual needs and interests.

The Xchange Dialogue module lets you create outbound phone and e-mail campaigns, and it enables you to generate reports about how specific groups of customers respond to each campaign. You can use these reports to identify potential sales opportunities. For example, you can create a report to find out how many customers purchased a new PC after receiving an e-mail notification about it. You can then generate another report to find out how many of these purchases were made by existing customers and reward their loyalty by offering them a 10% discount on software.

To facilitate communication between sales and support agents at your call center, FrontRange Solutions (formerly GoldMine Software; Colorado Springs, CO) released version 5.5 of FrontOffice 2000. FrontOffice 2000 comprises two modules that you can purchase together or separately. GoldMine Sales and Marketing lets agents find information about each customer, and GoldMine Service and Support includes a knowledge base with data about your company's products and services that they can use to provide technical support.

We ran a test drive on a previous version of FrontOffice in our May 2000 issue and experienced some difficulties with installing it. The latest upgrade to the software features an installation wizard certified by Microsoft, so that you can quickly install the software on PCs running Windows NT and Windows 2000 operating systems. We also had a hard time sending customer information from the Sales and Marketing module to the Service and Support module. Agents using Sales and Marketing can now create trouble tickets with customers' support issues, and they can e-mail each ticket directly to specific support agents.

The new version of FrontOffice 2000 also lets sales agents view customer data from the Sales and Marketing module on-line so that they can help customers from remote locations. Natalie Burdick, vice president of product management at FrontRange Solutions, estimates that the Sales and Marketing module outsells the Service and Support module by a 3to-1 ratio. She adds that although most call centers use CRM software to help increase sales, she expects that customer and technical support will soon become a greater issue for CRM vendors and their customers.

Exchange Applications' Xchange RealTime displays customers' contact information with a list of potentially relevant call scripts to help agents recognize and act on sales opportunities.

"The bulk of the relationship between agents and customers is really driven by the customer and technical support side," says Burdick. "For instance, if you buy computer equipment, you spend little time actually purchasing it. The rest of your time is spent calling the help desk if your modem's not working or if Windows gives you a strange error." Burdick adds that the actual time it takes to make a purchase is usually significantly less than the time customers require to receive assistance with a specific problem or request.

Burdick predicts that in the next few years, call centers will rely on CRM software to resolve customer support issues just as often as they do to make sales. She adds that there will always be an equal demand for both types of services. "No support

organization is going to go out and develop marketing campaigns and no sales organization is going to train their sales people to provide support," she says. "The division of labor is critical to any business."

Sales and customer support agents still work separately from each other in many call centers, but FrontOffice 2000 isn't the only CRM software available that can allow both types of agents to work more closely together. Point Information Systems' (Wellesley, MA) e-point 5 software suite includes the e-point Contact Center module so that all agents can view customers' histories, product data or call scripts from a Web browser or from their PCs.

To install e-point Contact Center on a Windows NT server, you need to purchase the CRM Hub module. Agents can then save their interactions with customers, which may include the results of phone calls, e-mail messages, text chat transcripts and Web collaboration sessions, to an Oracle or Microsoft SQL Server database.

Rafael Gomez, vice president of operations for Point Information Systems, anticipates that many CRM vendors will focus more on customer support because of a change in how some companies manage their call centers. "Most of the time sales and marketing and customer service agents are doing different things," he says. "But now you hear about organizations including a customer officer, someone to represent the interests of customers internally."

Gomez explains that the customer officer acts as an in-house consumer advocate who works closely with sales and customer service agents to ensure quality of service. Sales and customer support agents will work more closely together as a result, and they'll need to view the same data about customers by using the same CRM software. He adds that companies offering diverse products and services, like technology and telecommunications firms, will be among the first to hire customer officers at their call centers.

How long might it be before the customer officer becomes common at most call centers? "I would guess that it would take three years," he says. "It sounds like a terribly long time, but it needs to happen in enough companies to really make a difference. You're seeing the change start to take place already. The concept of a chief customer officer is a fairly new one. If that person generates profits, if they manage to retain and acquire more customers, then you'll see more companies [ hiring them]."

The E.5 software suite, from Epiphany (San Mateo, CA), comprises modules that you can also purchase as standalone products. Epiphany's Service Center and Service Portal modules enable agents to offer customer support and customers to find information on their own, respectively. Service Center lets agents view customer histories or other relevant information when helping customers through the phone, by e-mail, or during text chat and Web collaboration sessions. With Service Portal, customers can log in from your company's Web site to search a knowledge base and to view personal data, such as a list of their previous purchases.

Agents can use the Real-Time Personalization module to view information about cross-selling and upselling opportunities. For example, if a particular customer often purchases science-fiction films on DVD, the software could automatically notify an agent about a sale on new science-fiction movies from screen pop or a relevant page from your Web site. The Campaign Management module lets you create customer lists for outbound campaigns so that agents can phone or e-mail customers, for instance, when you run specific promotional offers.

Michael Trigg, director of product marketing for Epiphany, predicts that you can expect CRM software to become increasingly versatile. "Maybe you can describe it as next-generation CRM software," he says, "where there are less boundaries between sales, marketing and customer service, and much more focus on a complete relationship with each customer."

Onyx Software (Bellevue, WA) covers the sales, marketing and customer service of CRM with its Onyx 2000 (formerly Onyx Front Office 2000) software suite. Onyx 2000 includes three modules that enable you to create customized marketing campaigns. It also lets agents and business partners view customer records that contain information such as individual sales histories and purchase habits.

Although agents can use the e-point Contact Center module of Point Information Systems' e-point S suite to find sales leads, they can also view customer support cases, as shown here.

The Onyx Employee Portal module lets agents view customer information and a variety of additional data simultaneously. Let's say, for example, that a customer wants to purchase a wide-screen television. Agents can view the customer's credit history to make certain the customer can afford to make the purchase, a Web page with relevant product information, and a history of e-mail messages the customer sent about the product. Onyx Partner Portal lets you share the same customer data that agents view from the Employee Portal with your business partners from your Web site; they can enter their IDs and passwords to view this information.

You can create targeted marketing campaigns for customers with Onyx Customer Portal. The module lets you send e-mail messages promoting specific products to a given group of customers based on their purchase histories and on data from on-line surveys. You can also use Onyx Customer Portal to provide customers with self-service options that include an on-line knowledge base and updates that they can view about the status of their service requests.

To provide consistent data, Chordiant Software (Cupertino, CA) lets you cover all bases with Unified CRM Solution v3.0. The software suite includes the new Chordiant Unified Rules module that can help agents recommend appropriate products and services to each customer. Agents view the same customer information from phone, e-mail and Web channels.

Mergers among CRM vendors have also contributed to blurring the distinction between sales and customer support. After acquiring Vantive in January 2000, PeopleSoft (Pleasanton, CA) upgraded its PeopleSoft 8 CRM suite. PeopleSoft 8 CRM incorporates Vantive's software to include modules that enable agents to provide customer support, sales, marketing and help desk services. A fifth module also lets agents view records of customers' complaints about faulty products with information about what efforts your company has taken to assist each of the customers.

Some CRM software also provides different information to agents, customers and business partners. Pivotal's (Kirkland, WA) eRelationship 2000 CRM suite comprises two modules that enable partners and customers to search separate online knowledge bases from your Web site. The third module lets agents view information about partners and customers from a Web browser, allowing the same agent who helps a customer price one of your products through an e-mail message to also send your latest sales figures to all your partners.

If you're looking to find the right customer relationship management software for your call center, here's a list of the vendors mentioned in this article that can help you.

**Avaya**

800-784-6104/877-372-5719 [www.avaya.com](http://www.avaya.com) Chordiant Software 408-517-6100  
[www.chordiant.com](http://www.chordiant.com)

**Cincom**

800-2CINCOM/513-612-2300 [www.cincom.com](http://www.cincom.com) eLoyalty

877-4ELOYAL

[www.eloyalty.com](http://www.eloyalty.com)

Epiphany Software 650-356-3800 [www.epiphany.com](http://www.epiphany.com) Exchange Applications  
617-737-2244 [www.exapps.com](http://www.exapps.com)

FrontRange Solutions (formerly GoldMine Software) 800-776-7889

[www.frontrange.com](http://www.frontrange.com) Nortel Networks 800-4-NORTEL

[www.nortelnetworks.com](http://www.nortelnetworks.com)

**Onyx Software**

888-ASK-ONYX/425-451-8060 [www.onyx.com](http://www.onyx.com) Oracle

800-ORACLE-1 /650-506-7000 [www.oracle.com](http://www.oracle.com)  
PeopleSoft

800-380-SOFT/925-225-3000 [www.peoplesoft.com](http://www.peoplesoft.com)

Pivotal 877-PIVOTAL [www.pivotal.com](http://www.pivotal.com) Point Information Systems 781-239-1226

[www.pointinfo.com](http://www.pointinfo.com)

**Quintus**

800-337-8941/925-479-2920 [www.quintus.com](http://www.quintus.com) Siebel

800-647-4300/650-295-5000 [www.siebel.com](http://www.siebel.com)

**StayinFront**

(formerly Great Elk) 800-422-4520/973-461-4800 [www.stayinfront.com](http://www.stayinfront.com) Swallow Information Systems 978-867-6000

[www.swallow.com](http://www.swallow.com)

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**Company Names:**

**Nortel Networks Corp ( NAICS:334210; 511210; 541512 )**

**Swallow Information Systems Inc ( NAICS:511210 )**

**Cincom Systems Inc ( Duns: 05-648-7531 NAICS:511210 )**  
**Avaya Inc ( NAICS:334210; 541512; 511210; 335921 )**  
**Exchange Applications Inc ( Ticker: EXAP NAICS:511210 )**  
**Geographic Names: United States; US**

**Descriptors:** Manycompanies; Software packages; Call centers; Customer relationship management; Marketing management; Manyproducts  
**Classification Codes:** 9190 (CN=United States); 2400 (CN=Public relations); 5240 (CN=Software & systems); 7000 (CN=Marketing)  
**Print Media ID:** 42689

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**15/9/7 (Item 7 from file: 15)**  
**01002143 ? ? ? ? ? 96-51536**  
**How to evaluate the results of your call center's efforts**

**Wasserman, Robert**  
**Telemarketing ? v13n9 ?pp: 77-85**  
**Mar 1995**  
**ISSN: 0730-6156 ?Journal Code: TLM**  
**Document Type: Journal article ?Language: English ?Length: 7 Pages**  
**Word Count: 2512**

**Abstract:**

The first things to consider in any call center arrangement are the needs of the customers. While it is important to measure the value of each call, do not lose sight of the fact that a lost call may mean more than a lost sale. Over time, it is possible to determine the calling patterns that were generated by your customers, and to project probable future calling patterns based on historical data. Consultants can also conduct formal call center reviews to provide a thorough analysis that specifies specific strategies for maximizing performance in major areas of call center management.

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**Text:**

Estimates for the year 2000 predict that nearly half of all retail sales--about \$500 billion--will be completed by telephone. A 20 percent annual call volume growth rate is predicted for the remainder of the decade. Will your company or industry be ready for these growth trends?

If your business involves customer service, reservations, technical or catalog sales support, you most likely have employees who are dedicated to answering incoming customer calls seeking information or placing orders. While these "call centers" appear in all industries, they are heavily concentrated in banking, financial services, retail, travel and transportation, and manufacturing. As the markets grow, so do the innovative applications of calling center techniques for new and existing businesses.

Having established a formal call center, savvy businesspeople are best prepared to achieve their objectives of providing the highest level of

customer support possible and realizing a reasonable profit. Or are they? How do you begin to evaluate the results of your center's efforts on organizational objectives, customer service and profitability?

#### Setting Service Levels

The first things to consider in any call center arrangement are the needs of your customers. Naturally, when customers call an 800 number, they prefer an immediate response; an order taken, information accessed or problems remedied. But what level of service is really acceptable to your customers? What level of service will retain them as happy customers? And what level of service will enable your business to remain profitable--or become more profitable?

A measurement often used in the past was that if 80 percent of all calls were answered in 20 seconds or less, the majority of callers would be satisfied and call again another day. But it is important to recognize that people differ in their expectations, and they also have differing levels of importance to your business. Knowing who is calling, and why they are calling, provides the opportunity to fine-tune service levels within your call center. It may well be unnecessary to give casual "information" callers the same level of service that major, "repeat order" customers expect. How do you assess the needs and expectations of each group and manage to meet the standards you have established?

Start by breaking down all incoming calls into logical categories, that is, information seeking, order placement, service, etc. Within these categories, there are logical subsets, such as "corporate purchasing agents" versus casual, "first-time" buyers; those requiring human interaction and personal attention versus those who prefer to quickly complete their transactions using technology.

Second, determine the value of each of those calls to your business. It's easy to compare the \$10 order to the \$10,000 order, but do not forget to factor in the actual gross margin or profitability of each call. You may deeply discount the price of your product to big buyers and realize a significantly lower contribution to your gross margin than with the smaller buyer who pays full price for a few items.

Now that you have established the value of each call type, determine the cost of handling each. This should include costs of personnel, real-estate overhead, as well as the telecommunications and management information equipment and services.

All of these calculations enable you to make some basic decisions about whether it's practical and more profitable to handle some calls differently from others. Perhaps you should use more resources to provide different service levels depending on the value of each call. It will also enable you to make some individualized determinations about your callers' acceptance of the service level provided. How long will they wait for service? At what point do they hang up? What percent will call again? What percent are lost forever? Which calls do you really want to avoid losing, due to their outstanding profitability or future growth potential?

You now have a method by which you can measure--with hard data--the impact of handling or losing each type of call. This basic analysis provides the information needed to make decisions about the acceptable trade-offs between the cost of improving service and the potential loss of customers if service does not meet acceptable levels. The logical approach is to continue to add call center resources until a point is reached where the cost of the last resource added will exceed the value of the call that the resource enables you to handle.

Last, while it's important to measure the value of each call, don't lose sight of the fact that a lost call may mean more than a lost sale. It may mean a lost customer whose bad experience with your call center may result in taking his or her business somewhere else.

#### Evaluating Call Centers' Effectiveness

The first lesson a new call center manager learns is that it is not possible to plan the handling of incoming calls to a center in the same way that you can plan for most other areas of the business.

First, it's just not possible--even with historical data--to plan exactly how many calls will come in at any given moment dictating precisely how many representatives should be available to handle the load.

Second, it's prohibitively expensive to have a representative on hand to handle every call as it arrives. So, what approach makes the most sense?

Over time, it is possible to determine the calling patterns that were generated by your customers, and to project probable future calling patterns based on historical data. For example, the percentage of calls that came in during a given season, month, day or hour can be easily identified, as can the results of specific advertising campaigns, sales or promotions. This historical data is made available in a number of formats that can be used to forecast your future telecommunications and staffing needs.

#### Performance Monitoring

Specially designed network report packages are widely available for call centers of all sizes. While your ACDs provide information on calls after they reach your call center, these reports provide data on calls that are blocked as well as those that are completed. These report packages complement your call management system reports and can reveal critical patterns in 800 calling that help track response to sales promotions, marketing campaigns and advertising--by 800 number, area code, day of week or hour of day. These reports provide 800 call information that can help analyze and better manage call center contact.

Do not underestimate the power of information. Understanding where customers are can tell a business a great deal about its customer demographics. It also makes it easier to analyze and track performance trends, customer behavior or lost callers that require follow-up contact.

#### Expert Evaluation & Assistance

If your equipment or telephone carrier is not capable of producing the decision-level data your business requires, or if a seasoned call center expert is deemed necessary, you need consultative help. Any number of call center consulting groups can provide this expertise.

For example, there are sophisticated computer programs that evaluate the ability of call centers to handle calls based on software-generated simulations. Consultants use such systems to perform a variety of "what if" analyses that enable businesses to assess how their operations will handle calls before committing to a major call center redesign or start-up implementation. Prior to the availability of this kind of modeling, many businesses were reluctant to make changes to their call centers due to the fear of disrupting business. Simulation systems address these concerns by allowing customers to see alternative call-handling scenarios through a flexible model that assesses performance and profitability without disrupting ongoing call center operations.

## Productivity Through Technology

The agents who staff a call center are the most important component of the center's resources--and the most expensive. Because of their high relative cost, agent efficiencies must be maximized. A number of network-based options are available that can be used independently or in various combinations to increase agent productivity.

Caller recognition routing lets businesses use the network to automatically route incoming calls according to the phone number of the person calling. If the caller is a "priority" customer, for example, the call can be routed to a special agent or department for handling.

Most long-distance companies offer transfer connect services that let businesses redirect 800 calls to other departments or offices around the country. This eliminates the need to ask callers to hang up and redial. There is no guarantee they will call back.

Other technology lets call centers with multiple locations balance their calling volumes according to the volume they receive. If one location is busy, the network will forward the calls automatically to the next available facility.

More calls can be completed over the call center's 800 number through the use of network queuing services. Calls can actually be held, or queued, in the network until an agent at any of the call center locations becomes available. In these scenarios, callers can even hear customized announcements with 30-second reminders until the call is answered. While most of us are familiar with the call prompter menus that allow us to press 1, 2 or 3 for call redirection, some networks now recognize and process requests made with the spoken word. Since more than 30 percent of American homes and businesses--and some 97 percent of international callers--are still using rotary phones, voice recognition technologies allow more calls to be handled automatically. Recent developments make it possible to create menus using vocabularies of up to 2,000 words and even allow callers to select the language they want to hear and respond to.

Today, many companies create business applications using the combined power of the network, interactive voice response technologies and computer database intelligence to deliver more and more services to consumers. Some of these applications include:

\* Literature fulfillment that is designed to free agents from the routine, time-consuming, labor-intensive tasks of handling requests for catalogs, brochures or product information. This process can be easily mechanized to let callers provide their names and addresses to automatically request information. Using a fax serve material can be delivered to the caller in minutes.

\* Agents also spend significant time answering the same questions or providing routine information to callers. Inquiry processing provides callers 24-hour-a-day access to information such as account balances, order status and hours of operation, without the need for expensive agent involvement.

Many orders do not require the skills or time of a trained agent. Through the use of transaction processing, subscription renewals, prescription refills, donations and other simple credit transactions can be automatically processed without the need for further human intervention.

## Technology, not Always The Answer

With all the available technology--most of which is quite affordable--it's tempting to use it in all business applications to increase efficiencies, productivity and profitability. However, technology must be applied wisely and intelligently designed to succeed in its intended use.

Businesses have a responsibility to ensure that callers are not confused or frustrated while interacting with automated services. This makes it necessary to fully understand the capabilities of these new technologies. It's important to know that automated interactions do not necessarily mimic the transactions carried on between two people. When designing applications scripts, it's wise to enlist the help of acknowledged experts in the field to be certain the applications are user friendly, flexible and cost-effective. And whenever possible, provide callers the option to select a live operator.

## Call Center Consultants

For many businesses, technology is advancing so rapidly that external resources may be enlisted as the best way to objectively review the possibilities. Call center consultants should be considered before tackling the myriad issues surrounding a center's design, relocation or applications makeover. Most long-distance companies, as well as private telecommunications concerns, can make real-world call center expertise available on reasonable terms.

A host of tools are available to assist with call center site selection. A sophisticated computer model is often used to provide structured, objective input that helps identify the best site for a new or additional center. Using the goals and criteria of the business, consultants factor in a wide range of economic, demographic and related data to answer four basic questions: How many call centers are needed, where should they be, what geographic region will each center service, and how many employees are required?

Often, the list of possible sites is fed into the model along with criteria for a location, such as call-volume forecasts, growth rates, target wages, real-estate costs and floor-space requirements. Models can be designed to rate a site's communications, available labor pool, real-estate costs, climate, crime rate, transportation, housing costs, telemarketer density and long-term labor availability. The data provides a logical and orderly framework for choosing a call center location that helps minimize costs and best satisfies the business' goals and objectives.

Consultants can also conduct formal call center reviews to provide a thorough analysis that specifies specific strategies for maximizing performance in major areas of call center management. For instance:

- \* Marketing--How well does the center strategy align with a business' marketing goals? Does competitive focus demand that the call center be a low-cost provider or value-added service provider? Is it a cost center rather than a profit center?
- \* Advertising and promotions--Is there an effective partnership between the call center and the advertising division?
- \* Human resources--Could more be done to minimize employee turnover and maximize employee performance?
- \* Call management--Are the network services, equipment and staff required to keep the center running at peak efficiency being effectively utilized?

- \* Information management--Does the call center have an effective method for gathering and distributing information? Can confidential information be protected?
- \* Environmental design--Is productivity adversely affected by the physical location or ergonomics of the call center and its workstations?
- \* Operations--Are policies and operating guidelines clear, up-to-date and communicated to the entire call center staff? Is the center equipped and prepared to handle emergency situations?

These call center reviews often include interviews and focus group sessions with management, supervisors, agents and support organizations, as well as evaluations of the call center's physical environment, systems and performance reports, and other key operations. The resulting report provides a detailed plan of action for improving call center applications.

In addition to this help, call center supervisors and agents can obtain the tools necessary to do an outstanding job by attending call center training workshops and seminars in center implementation, management, sales and customer service skills.

In summary, when call centers combine the power of today's technologies with proven modeling tools and expertise, they can design and develop world-class applications and operations that will add significant bottom-line value to their business. It is really up to management to see that call centers operate at peak efficiencies, maximizing productivity and profitability for the business.

Considering the fact that call centers are often the only contact a customer has with the business, there's no excuse for not putting the call center on the cutting edge of technology. It could be the single most important decision a business makes.

Robert Wasserman is national product manager for call center offer development for AT&T Call Center Solutions. Mr. Wasserman and his team work with customers to develop and provide customers with turnkey call center solutions.

## **THIS IS THE FULL-TEXT.**

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**Geographic Names: US**

**Descriptors: Telemarketing; Performance evaluation; Efficiency; Recommendations  
Classification Codes: 9190 (CN=United States); 7300 (CN=Sales & selling)**

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**15/9/8 (Item 8 from file: 148)**

**07813285 ? ? Supplier Number: 17015684 (THIS IS THE FULL TEXT )**

**How to evaluate the results of your call center's efforts. (telemarketing operations)**

**Wasserman, Robert  
Telemarketing , v13 , n9 , p77(7)  
March , 1995**

**ISSN: 0730-6156**

**Language: ENGLISH**

**Record Type: FULLTEXT**

**Word Count: 2714 ? Line Count: 00218**

**Text:**

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All of these calculations enable you to make some basic decisions about whether it's practical and more profitable to handle some calls differently from others. Perhaps you should use more resources to provide different service levels depending on the value of each call. It will also enable you to make some individualized determinations about your callers' acceptance of the service level provided. How long will they wait for service? At what point do they hang up? What percent will call again? What percent are lost forever? Which calls do you really want to avoid losing, due to their outstanding profitability or future growth potential?

You now have a method by which you can measure - with hard data - the impact of handling or losing each type of call. This basic analysis provides the information needed to make decisions about the acceptable trade-offs between the cost of improving service and the potential loss of customers if service does not meet acceptable levels. The logical approach is to continue to add call center resources until a point is reached where the cost of the last resource added will exceed the value of the call that the resource enables you to handle.

Last, while it's important to measure the value of each call, don't lose sight of the fact that a lost call may mean more than a lost sale. It may mean a lost customer whose bad experience with your call center may result in taking his or her business somewhere else.

#### Evaluating Call Centers' Effectiveness

The first lesson a new call center manager learns is that it is not possible to plan the handling of incoming calls to a center in the same way that you can plan for most other areas of the business.

First, it's just not possible - even with historical data - to plan exactly how many calls will come in at any given moment dictating precisely how many representatives should be available to handle the load.

Second, it's prohibitively expensive to have a representative on hand to handle every call as it arrives. So, what approach makes the most sense?

Over time, it is possible to determine the calling patterns that were generated by your customers, and to project probable future calling patterns based on historical data. For example, the percentage of calls that came in during a given season, month, day or hour can be easily identified, as can the results of specific advertising campaigns, sales or promotions. This historical data is made available in a number of formats that can be used to forecast your future telecommunications and staffing needs.

#### Performance Monitoring

Specifically designed network report packages are widely available for call centers of all sizes. While your ACDs provide information on calls after they reach your call center, these reports provide data on calls that are blocked as well as those that are completed. These report packages complement your call management system reports and can reveal critical patterns in 800 calling that help track response to sales promotions, marketing campaigns and advertising - by 800 number, area code, day of week or hour of day. These reports provide 800 call information that can help analyze and better manage call center contact.

Do not underestimate the power of information. Understanding where customers are can tell a business a great deal about its customer demographics. It also makes it easier to analyze and track performance trends, customer behavior or lost callers that require follow-up contact.

#### Expert Evaluation & Assistance

If your equipment or telephone carrier is not capable of producing the decision-level data your business requires, or if a seasoned call center expert is deemed necessary, you need consultative help. Any number of call center consulting groups can provide this expertise.

For example, there are sophisticated computer programs that evaluate the ability of call centers to handle calls based on software-generated simulations. Consultants use such systems to perform a variety of "what if" analyses that enable businesses to assess how their operations will handle

calls before committing to a major call center redesign or start-up implementation. Prior to the availability of this kind of modeling, many businesses were reluctant to make changes to their call centers due to the fear of disrupting business. Simulation systems address these concerns by allowing customers to see alternative call-handling scenarios through a flexible model that assesses performance and profitability without disrupting ongoing call center operations.

#### Productivity Through Technology

The agents who staff a call center are the most important component of the center's resources - and the most expensive. Because of their high relative cost, agent efficiencies must be maximized. A number of network-based options are available that can be used independently or in various combinations to increase agent productivity.

Caller recognition routing lets businesses use the network to automatically route incoming calls according to the phone number of the person calling. If the caller is a "priority" customer, for example, the call can be routed to a special agent or department for handling.

Most long-distance companies offer transfer connect services that let businesses redirect 800 calls to other departments or offices around the country. This eliminates the need to ask callers to hang up and redial. There is no guarantee they will call back.

Other technology lets call centers with multiple locations balance their calling volumes according to the volume they receive. If one location is busy, the network will forward the calls automatically to the next available facility.

More calls can be completed over the call center's 800 number through the use of network queuing services. Calls can actually be held, or queued, in the network until an agent at any of the call center locations becomes available. In these scenarios, callers can even hear customized announcements with 30-second reminders until the call is answered.

While most of us are familiar with the call prompter menus that allow us to press 1, 2 or 3 for call redirection, some networks now recognize and process requests made with the spoken word. Since more than 30 percent of American homes and businesses - and some 97 percent of international callers - are still using rotary phones, voice recognition technologies allow more calls to be handled automatically. Recent developments make it possible to create menus using vocabularies of up to 2,000 words and even allow callers to select the language they want to hear and respond to.

Today, many companies create business applications using the combined power of the network, interactive voice response technologies and computer database intelligence to deliver more and more services to consumers. Some of these applications include:

- \* Literature fulfillment that is designed to free agents from the routine, time-consuming, labor-intensive tasks of handling requests for catalogs, brochures or product information. This process can be easily mechanized to let callers provide their names and addresses to automatically request information. Using a fax server, material can be delivered to the caller in minutes.

- \* Agents also spend significant time answering the same questions or providing routine information to callers. Inquiry processing provides callers 24-hour-a-day access to information such as account balances, order status and hours of operation, without the need for expensive agent involvement.

Many orders do not require the skills or time of a trained agent. Through the use of transaction processing, subscription renewals, prescription refills, donations and other simple credit transactions can be automatically processed without the need for further human intervention.

#### Technology, Not Always The Answer

With all the available technology - most of which is quite affordable - it's tempting to use it in all business applications to increase efficiencies, productivity and profitability. However, technology must be

applied wisely and intelligently designed to succeed in its intended use.

Businesses have a responsibility to ensure that callers are not confused or frustrated while interacting with automated services. This makes it necessary to fully understand the capabilities of these new technologies. It's important to know that automated interactions do not necessarily mimic the transactions carried on between two people. When designing applications scripts, it's wise to enlist the help of acknowledged experts in the field to be certain the applications are user friendly, flexible and cost-effective. And whenever possible, provide callers the option to select a live operator.

#### Call Center Consultants

For many businesses, technology is advancing so rapidly that external resources may be enlisted as the best way to objectively review the possibilities. Call center consultants should be considered before tackling the myriad issues surrounding a center's design, relocation or applications makeover. Most long-distance companies, as well as private telecommunications concerns, can make real-world call center expertise available on reasonable terms.

A host of tools are available to assist with call center site selection. A sophisticated computer model is often used to provide structured, objective input that helps identify the best site for a new or additional center. Using the goals and criteria of the business, consultants factor in a wide range of economic, demographic and related data to answer four basic questions: How many call centers are needed, where should they be, what geographic region will each center service, and how many employees are required?

Often, the list of possible sites is fed into the model along with criteria for a location, such as call-volume forecasts, growth rates, target wages, real-estate costs and floor-space requirements. Models can be designed to rate a site's communications, available labor pool, real-estate costs, climate, crime rate, transportation, housing costs, telemarketer density and long-term labor availability. The data provides a logical and orderly framework for choosing a call center location that helps minimize costs and best satisfies the business' goals and objectives.

Consultants can also conduct formal call center reviews to provide a thorough analysis that specifies specific strategies for maximizing performance in major areas of call center management. For instance:

- \* Marketing - How well does the center strategy align with a business' marketing goals? Does competitive focus demand that the call center be a low-cost provider or value-added service provider? Is it a cost center rather than a profit center?

- \* Advertising and promotions - Is there an effective partnership between the call center and the advertising division?

- \* Human resources - Could more be done to minimize employee turnover and maximize employee performance?

- \* Call management - Are the network services, equipment and staff required to keep the center running at peak efficiency being effectively utilized?

- \* Information management - Does the call center have an effective method for gathering and distributing information? Can confidential information be protected?

- \* Environmental design - Is productivity adversely affected by the physical location or ergonomics of the call center and its workstations?

- \* Operations - Are policies and operating guidelines clear, up-to-date and communicated to the entire call center staff? Is the center equipped and prepared to handle emergency situations?

These call center reviews often include interviews and focus group sessions with management, supervisors, agents and support organizations, as well as evaluations of the call center's physical environment, systems and performance reports, and other key operations. The resulting report provides a detailed plan of action for improving call center applications.

In addition to this help, call center supervisors and agents can

obtain the tools necessary to do an outstanding job by attending call center training workshops and seminars in center implementation, management, sales and customer service skills.

In summary, when call centers combine the power of today's technologies with proven modeling tools and expertise, they can design and develop world-class applications and operations that will add significant bottom-line value to their business. It is really up to management to see that call centers operate at peak efficiencies, maximizing productivity and profitability for the business.

Considering the fact that call centers are often the only contact a customer has with the business, there's no excuse for not putting the call center on the cutting edge of technology. It could be the single most important decision a business makes.

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**Industry Codes/Names: ADV Advertising, Marketing and Public Relations**

**Descriptors: Telemarketing industry--Services; Customer service--Evaluation**

**Product/Industry Names: 7319700 (Telemarketing Services)**

**Product/Industry Names: 7389 Business services, not elsewhere classified**

**File Segment: TI File 148**

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